ABSTRACT

SMITH, ERIN GAYLE. Consumer Preferences of Home Textile Products: An Investigation into Hispanic Shoppers' Buying Behavior. (Under the direction of Michelle Jones.)

The purposes of this study were to define the U.S. home textile industry by means of an industry profile, explore the buyer characteristics and purchase decision factors that may be important to U.S. Hispanic consumers as it relates to their purchases of home textile products, and determine if products are currently available to satisfy the expressed preferences of the Hispanic home textile consumer. Using known variables for consumer preferences for apparel and pairing them with variables unique to home textiles (e.g. thread count, bed-in-a-bag packaging, sateen weave), this study explored the relative importance Hispanic consumers place on traditional purchase variables when shopping for home fashions. This research provides a foundation for future research in an emerging area of consumer study by establishing a framework for investigations into home textile markets.

Two research objectives were investigated during the course of this study. Research Objective One profiled the U.S. home textile industry by exploring the manufacturing and specialty retail leaders of bedding and bath products. Archival records, documents and direct observation were used to gather information to satisfy Research Objective One, which was comprised of two Research Questions. The two leading home textile manufacturers were WestPoint Stevens and Springs Industries; the two leading home textile mass specialty retailers were Bed Bath & Beyond and Linens 'n Things.

Research Objective Two sought to ascertain the level of importance that traditional buyer decision factors such as price, color and style have within the Hispanic consumer market for home textiles, and to determine if the specialty retail market for home textiles

offers products that satisfy the preferences of the Hispanic consumer market. A survey was used to gather information from thirty Hispanic women, and observations were made at three locations of each home textile mass specialty retailer. After the women completed a questionnaire regarding their home textile preferences for product characteristics and retail channel, the data were analyzed with descriptive statistics and one-sample t-tests; ANOVA tests were performed post hoc for further analysis. The five most important purchase criteria were found to be price, color and style for bedding; and price and color for bath products. Products matching the preferences of the survey subjects were largely available in home textile mass specialty retailers.

CONSUMER PREFERENCES OF HOME TEXTILE PRODUCTS: AN INVESTIGATION INTO HISPANIC SHOPPERS' BUYING BEHAVIOR

by
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BIOGRAPHY

Erin Gayle Smith was born on April 26, 1980, in Painesville, Ohio. Her parents are William and Deborah Smith, and she has one sister, Shannon. Her family moved to Charlotte, North Carolina in 1988.

She attended East Mecklenburg High School in Charlotte, North Carolina. After graduating from high school in 1998, Erin began her undergraduate education at North Carolina State University. Erin graduated in the spring of 2002 with a Bachelor of Science in Textile and Apparel, Technology and Management. She then went on to pursue her Master of Science degree the following fall semester, also at North Carolina State University. Erin graduated with a Master of Science in Textile Technology Management in the summer of 2004.

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CHAPTER I

Introduction

Many textile producers and retailers in the U.S. recognize the buying power of Hispanic consumers and are making efforts to reach this $500 billion market (Kmart Corporation, 2002). Companies such as Springs Industries (Lazaro, 2002), Kmart and Sears see the increase in discretionary income of the Hispanic population as a new market opportunity, and they are taking steps to provide products to tap into that market. The U.S. Hispanic market is growing rapidly in size and buying power. In 2000, there were 32.8 million Hispanics living in the U.S., accounting for 12% of the U.S. population (U.S. Census Bureau, 2000). The Hispanic population is expected to grow to 15.8% of the U.S. population by 2015 (U.S. Census Bureau, 2000). In 2002, Hispanic consumer spending was approximately $500 billion, and it is expected to grow to $926.1 billion by 2007 (Holmes, 2003).

To effectively understand how the home textile industry is affected by different markets, one must first understand the environment in which the manufacturer, retailer and consumer interact. Identifying current industry dynamics provides a context to the changing industry and changing markets. For example, if U.S. home textile producers and retailers are going to target the Hispanic market with differentiated products, they need to understand how the Hispanic market differs from other U.S. markets (Holmes, 2003) and how buyer decision factors affect Hispanic consumers. Once this background research is completed, the home textile producers and retailers can provide, promote and sell products that satisfy the Hispanic consumer.

An abundance of market research exists on consumer buying behavior for apparel products (Beaudoin, Lachance & Robitaille, 2003; Lee, Kunz, Fiore & Campbell, 2002; Parks & Widdows, 2001; Thomas, Cassill, & Forsythe, 1991). This existing market research reveals that consumers typically use price, style, quality, size/fit, color, fabric, brand name and country of origin most frequently when making choices for apparel. These findings have enabled manufacturers and retailers to tailor their marketing efforts (product, price, placement and promotion) to accommodate consumer preferences for purchases of apparel products. While empirical research exists on purchase behavior for apparel, little to no empirical research exists on consumer preferences for home textile products (i.e., bed and bath).

Current trade literature is replete with information indicating that home textile manufacturers and retailers are emphasizing home fashion as a focus in their product line development (SanFillipo, 2003; Scardino, 2003). The home textiles industry, once considered primarily commodity manufacturers, is currently experiencing a shift towards product differentiation. As consumers demand, and are willing to pay for, innovations and new trends in home textiles, home textile companies have the opportunity for higher profit margins. This development toward a fashion forward home textile industry is a strong rationale for academic research on the topic. Identifying consumer preferences for home textiles will allow manufacturers and retailers of home textiles to adapt their offerings to capitalize on product trends and consumer preferences.

Purpose of the Study

The purposes of this study were to define the U.S. home textile industry by means of an industry profile of the leading producers and specialty retailers of bedding and bath products, explore the buyer characteristics and purchase decision factors that may be important to U.S. Hispanic consumers as it relates to their purchases of home textile products, and determine if products are currently available to satisfy the expressed preferences of the Hispanic home textile consumer. Using known variables for consumer preferences for apparel and pairing them with variables unique to home textile products (e.g. bed-in-a-bag, thread count, sateen weave), this study explored the relative importance Hispanic consumers place on traditional purchase variables when shopping for home fashions.

Research Objectives

- Research Objective One: To profile the U.S. home textile industry by exploring the manufacturing and specialty retail leaders of bedding and bath products.
- Research Objective Two: To ascertain the level of importance that traditional buyer decision factors such as price, color and style have within the Hispanic consumer market for home textile products.

Scope

The domestic home textile industry includes a broad range of home textile products including kitchen, wallcoverings, bedding and bath. Due to the exploratory nature of this research, the focus was narrowed to bed and bath products to gain a more in-depth look at consumer decision factors. Although the scope of this project is limited to a small subset of U.S. consumers of home textile products, the results of the study can be used as the foundation for developing more extensive quantitative studies in the area of consumer preferences for home textiles.

Limitations

The limitations of the study are associated with the exploratory research approach and the sample size of the survey. The case study approach uses the convergence of evidence, which allows a research phenomenon to be studied at an in-depth level from multiple angles. By nature of the case study design, the results are not generalizable to all home textile products and all populations. However, this approach affords a unique perspective in the examination of a research phenomenon in which little to no empirical research exists. A convenience sample was used in the survey portion of the data collection procedure. The survey comprised a relatively small number of respondents (n=30), thus significance levels found and reported in this study are limited. The results will, however, provide indications for points of future investigation.

Significance of the Study

This research provides insight into Hispanic consumers' preferences and buying factors for home textiles, which is an area that has not been studied. The increasing buying power of the fast-growing Hispanic population makes it important for the U.S. textile industry to understand what products can be successfully targeted at Hispanic consumers. In addition, this study will offer a profile of the fast-changing U.S. home textile industry, for which a concise description of the industry is not currently available.

The textile industry's increasing focus on home textiles may be because those products are simpler and less time- and labor-intensive to manufacture than apparel products. Thus, the U.S. textile industry may be able to gain new competitive advantages in commodity products and differentiated products. The methodology of this study may serve as a template for future research in the area of home textile product preferences.

Definition of Terms

Wide inconsistencies have been noted in the terminology and definitions of the home textile terms. In trade literature, "home fashions," "home furnishings," "household textiles" and other terms like "home goods lines" are often used interchangeably. In addition, there are differences between terminology used by technical sectors of the textile industry and the terminology that is used by marketers in relating product information to the consumer. For example, "thread count" is often used by marketers to express the technical aspect of the number of yarns per unit measure. These inconsistencies provide additional opportunity for future research. Table 1 provides a list of major terms associated with home textiles.

Table 1. Definition of Terms

Term	Definition
Buying decision factors	The variables involved when considering a product for purchase. Also called: “evaluative criteria” (Hsu & Burns), “purchase decision-making” (Kim, 2001), “purchase decision,” “buying criteria” and “decision criteria.”
Domestics	Textile products for the home such as bed and bath linens, pillows, and kitchen linens (Jernigan & Easterling, 1990, p. 12).
Hispanic consumer	Defined for the purpose of this study as an individual, characterized by self-identity with an ethnic Hispanic group, who is a consumer in the U.S. textile market.
Home fashions	Textile products used for home end-uses such as towels, bedding, upholstery fabrics, area floor coverings, draperies, and table linens, and whose styles change over time in response to changing fashion trends (Burns & Bryant, 1997, p. 391). Also referred to as “home textiles.”
Home furnishings	Home furnishings are classified into six categories: Furniture (upholstery, slip covers), Hangings (drapes, curtains), Domestics (sheets, pillowcases, bed spreads, blankets, mattress covers), Linens (table cloths, napkins, towels and wash cloths), Floor Coverings (indoor and outdoor carpets, rugs, padding), Miscellaneous (lamp shades, throw pillows) (Cohen, 1989).
Household textiles	All textile products used within the home, except carpets, drapes and curtains, wallcoverings, and upholstery, are usually considered household textiles. Bedsheets, pillowcases, mattress pads, towels, blankets, tablecloths, and the like constitute this category (Hatch, 1993, p.11-12).

CHAPTER II

Review of Literature

In this chapter, background information on existing literature that established buyer purchase decision factors is provided. In addition, literature that describes the U.S. home textile industry is included to establish terminology specific to the home textiles sector. This chapter concludes with information on Hispanic buying characteristics currently defined by existing literature, general characteristics of the Hispanic market, and discussion of industry efforts in targeting Hispanic consumers with differentiated product mixes.

Buyer Decision Factors

Model of Buyer Behavior

Marketers can influence buyer decisions using various marketing efforts. Figure 1 shows a model of consumer behavior in which the buyer is exposed to marketing and other stimuli and then responds with a purchase that reflects a variety of choices.

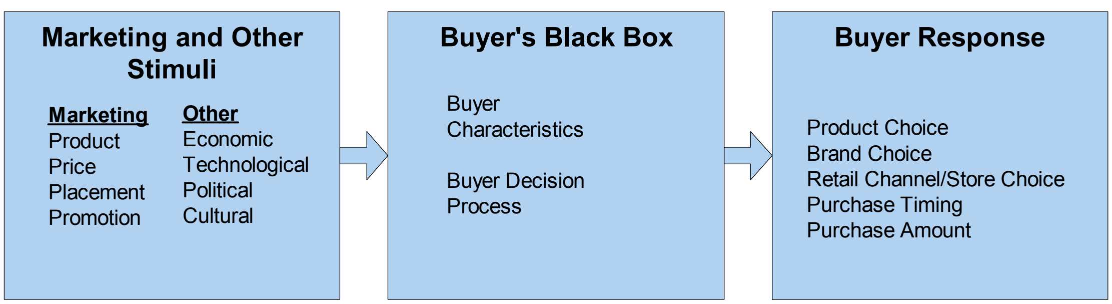

Figure 1. Model of Buyer Behavior. Adapted from Kotler & Armstrong, 2001, p. 171.

The marketing stimuli can take a number of forms (Kotler & Armstrong, 2001). Some marketing stimuli, including the marketing mix and product advertisements, can be controlled by the manufacturer or retailer; however, "Other" stimuli are out of the control of the interested company (Kotler & Armstrong). This focus of this study is on the product differentiation and cultural stimuli. Although the manufacturer and retailer are unable to control cultural influences, they can tailor their products to targeted consumers based on what they know about a given consumer's cultural influences.

The buyer's black box is where the decision process takes place, and is the hardest piece of the buyer decision model for marketers and companies to understand (Kotler & Armstrong, 2001). The black box is so named because marketers can only guess how the buyer makes his or her decision based on the stimuli they receive from the first box in the model. Buyer characteristics that affect the decision process can include cultural, social, personal and psychological characteristics (Kotler, 2000).

The final step in the buyer behavior model is the buyer's response (Kotler & Armstrong, 2001). Buyer response reflects the results of the decision process that occurred in the black box, but does not reveal why the consumer made the choice he or she did. Although marketers do not know how the consumer considered the stimuli they experienced, the marketer receives feedback based on the buyer response; which products the consumer purchases, where they purchase, when they purchase and the quantity of the item that is purchased.

Buyer Characteristics

According to Kotler and Armstrong (2001), consumer behavior is impacted by cultural, social, personal and psychological factors. A person's preferences are shaped by factors such as their age, gender, occupation, ethnicity and location. These factors differ between consumer markets, and this study focuses on those differences between ethnic markets, described by countless researchers, including Kim (2001) who identified purchase decision-making in apparel and electronics.

Research has revealed that consumers from different markets, including markets differentiated by ethnicity, shop in different ways (Kim, 2001). The differences in how consumers shop for products must be considered as well as what criteria consumers use to choose which products they will buy. For example, in examining shopping behavior within the Hispanic market, research shows that shopping with companions or with family members is not unique to Hispanic shoppers, but is an important part of the product buying experience (Kim, 2001; Nichols, 1997). The time spent shopping also tends to vary between markets, including between Hispanic markets (Nichols).

O'Neal reported in 1998 that U.S. retailers have found sufficient differences in apparel preferences between African American consumers and other markets to offer special apparel assortments. African American apparel consumers prefer specific aesthetic elements of clothing that are different from the preferences of other markets (O'Neal, 1998). Desirable characteristics of clothing were identified as "bold" and "high affect" colors and "off beat" patterns. Similarly, Holmes (2003) reported that bright color is an expressed preference of the Hispanic community. This preference should be taken advantage of in product color as well as packaging (Holmes), and in the development and marketing of apparel lines.

Hsu and Burns (2002) conducted a study to determine the difference in purchase criteria used by Taiwanese and U.S. apparel consumers. The purpose of the study was to compare the importance of purchase criteria for apparel items between Taiwanese and U.S. women. One hundred nineteen Taiwanese and 84 U.S. women from a nonprobability sample filled out a questionnaire about the importance and relative importance of the evaluative criteria used when choosing apparel. The clothing criteria investigated were price, style, quality, size/fit, color, fabric, brand name, location of manufacturer, suitability for wear on campus, how pleasing it was to others, coordination with other clothes and comfort. The first null hypothesis of the study was rejected—that there would be no difference between the groups in the evaluative criteria used. The second null hypothesis—that both groups would identify the same criteria as most important—was not rejected. Size/fit was found to be the most important criterion for both groups, but it was found that U.S. consumers placed more importance on comfort and quality, while Taiwanese consumers placed more importance on appropriateness and location of manufacturer.

Kulkarni (1995) described consumer apparel selection from a psychological perspective. The paper noted the difference between customer-oriented properties and consumer-oriented properties. The customer-oriented properties, those that are usually considered during the purchase process, include texture, drape and expected resistance to shrinking of the fabric and color, style and comfort of the entire garment. The consumer-oriented properties are those that influence the performance of the garment, and include fabric weight, crease retention and colorfastness to washing and sunlight. According to Kulkarni, the consumer-oriented properties are often overlooked at the time of purchase because the buyer considers aesthetic properties and only evaluates performance factors after purchase, causing a reduction in the perceived value if the garment does perform to the buyer's expectation.

Oliver (1985) examined how sex-role impacts apparel purchases. The study examined buying patterns in traditional (husband works, wife is a homemaker) and modern (husband and wife both work and share home responsibilities) gender roles within married households. Husbands and wives were asked, among other topics, who in their household makes decisions on color, style fabric and price of a garment. The study found few differences purchasing patterns between modern and traditional households, but found that the husband is responsible for much of the decision making for his own clothing—a finding counter to the assumption stated in the paper that wives usually choose most of their husbands' clothing.

Coley and Burgess (2003) studied gender differences in buying. The study compared men and women to identify differences in affective (emotional) and cognitive (thinking) processes involved in impulse buying. The study also sought to identify gender differences relating to the product category of impulse purchases. Research subjects were 227 college students chosen because impulsive buying behavior is most prominent in younger adults with some education beyond high school. Based on existing literature, Coley and Burgess hypothesized that there would not be a significant gender difference between the impulsive buying behaviors of men and women regarding affective processes, cognitive processes, or product category. The data collection tool was a survey. Statistical analysis of variance tests were used to evaluate the survey results. All three hypotheses were rejected; there was a significant difference in the buying behaviors of men and women.

Workman and Kidd (2000) studied the buying motivation of fashion consumer groups using the Need for Uniqueness scale. The study aimed to test the hypothesis that people who were fashion change agents would have more need for uniqueness than fashion followers. Subjects in the study were 264 college students selected for convenience and because college students possess characteristics of fashion change agents and are a large market segment. The subjects were categorized as fashion change agents or fashion followers based on the Measure of Innovativeness and Opinion Leadership scale and then evaluated on the Need for

Uniqueness scale. The hypothesis was supported in the conclusions of the research. The study found that, when fashion change agents feel similar to others in a group, they exhibit negative emotions and discard a current style in favor of adopting a new style. When fashion followers feel similar to a group, they exhibit positive emotions and take no action—if the fashion following individual feels dissimilar to the group, they exhibit behavior change by adopting the prevalent style.

Johnson, Schofield and Yurchisin (2002) conducted research on the psychological aspect of apparel. They studied if and how people use the appearance and dress of others to gather information about them. The purpose of the research was to determine what impression research subjects formed of others and what cues they used to form those impressions. The subjects were 39 women gathered by placing an advertisement in a newspaper. During the research, the subjects were asked questions in an interview format, the answers were classified and categorized, and frequencies were established for each of the responses. The study found that the subjects did form impression of others based on appearance and dress, and that the subjects believed that others used appearance and dress cues to form opinions about them.

As demonstrated in the research findings discussed previously, the physical (gender), psychological (fashion orientation) and cultural (ethnicity) attributes of markets all play a major role in shaping the way individuals in a market interpret marketing and other stimuli. The consumer's interpretation of that stimuli, in turn, affects the buyer decision process and ultimately the buyer response.

Buyer Decision Process

Figure 1 shows that both buyer characteristics and the buyer decision process affect the decision made during the purchase process. Consumers use a wide range of criteria when making decisions about purchases. According to Hsu and Burns (2002), researchers have most often investigated the following clothing criteria: price, style, quality, size/fit, color, fabric, brand name and country of origin. Style has been reported as the category most used in the study of consumer clothing evaluation (Eckman, Damhorst & Kandolph, 1990). The importance of the criteria depends on the level of involvement of the purchase (Thomas, Cassill & Forsythe, 1991) and a wide variety of consumer variables.

Thomas, Cassill and Forsythe (1991) studied apparel involvement dimensions in consumer purchase decisions. The study sought to find out if there are multiple dimensions to apparel involvement and if differences in apparel involvement dimensions are related to fiber information sources and respondent demographics. The research instrument used in the study was a questionnaire. Examining the 177 useable responses from female apparel consumers in malls in the southern U.S., it was found that apparel involvement has two dimensions, “dress to express personality,” which describes women who use their apparel to communicate who they are, and “dress as a signaling device,” which describes women who determine how others see them based on their apparel. The study also found that current apparel marketing did not sufficiently emphasize fiber content. The research project is germane to this study because a similar research instrument was used on female subjects to investigate purchase behavior.

A staff report published in Home Textiles Today (2000) reported on the opinions of six merchandisers from various companies at the Spring Home Textile Market in High Point, North Carolina. The merchandisers were asked if consumers make product decisions based on the aesthetics of a product, or based on the brand or designer of the product. A respondent in the study identified brands and designer names as part of the product differentiation within a store. A merchandise manager for an online retailer indicated that designer labels are rarely carried by internet-only home textile retailers. Design, color and timing of product availability were identified as important consumer decision factors. Similarly, another merchandiser said designer names are important to product sales, but that carrying merchandise for targeted customers is more important.

Eckman, Damhorst and Kandolph (1990) conducted a two-part study to identify the criteria used by consumers to evaluate women's apparel. The study first summarized findings from 22 studies published between 1971 and 1988 that looked at evaluative criterion for apparel. Rating scales were used in more than half of those existing studies. Four categories of intrinsic and one category of extrinsic criteria were established to group the criteria identified in the studies: product composition (style, color, appearance etc.), performance (care, size/fit, durability, comfort etc.), quality (construction, fabric etc.), sex appropriateness and extrinsic criteria (brand, price, store, approval of others, etc.). The second part of the study, conducted in 1986, involved asking 80 female consumers open-ended questions about the criteria they had used when evaluating a piece of apparel during a shopping trip. Responses from the interviews were grouped into four separate criteria categories: aesthetic, usefulness, performance/quality and extrinsic criteria. The researchers noted that none of the responses included the apparel item's country of origin. The most frequent responses were style, color, fit, fabric, appearance and price. The results of this study reflect preferences of consumers in 1986, when the data was collected.

No existing research has been found on decision factors for home textiles purchases. In the absence of such research, this study will draw a parallel from the ample research on the criteria used by consumers to evaluate clothing for purchase. Table 2 lists the decision criteria identified by other studies of consumer buying behavior.

Table 2: Studies of Consumer Decision Criteria for Apparel Products

Study	Type of Research	Criteria	Subjects	Product	Question method
Buying Decisions may depend on look, label (2000)	Trade	Style, color, brand/designer name, timing of availability	Trade Professionals	Home Textiles	Open-ended
Eckman, Damhorst & Kandolph (1990)	Academic	Part 1: 22 Existing Studies Extrinsic: Price, brand/label, country of origin, store, coordination with wardrobe, salesperson's evaluation, department in store, approval of others, warranty Intrinsic (4 categories): Product composition: style, color/design, fabric, appearance, fiber content Performance: care, size/fit, durability, comfort, safety, colorfastness Quality: Construction, physical, fabric Sex appropriateness	Varied	Apparel	Rating Scales/ Lists
	Academic	Part 2: 1990 Study Responses coded into 4 categories: Aesthetic, usefulness, performance and quality, extrinsic	Consumers	Apparel	Open-ended
Hsu & Burns (2002)	Academic	Fabric, comfort, size/fit, quality, location of manufacturer, color, how pleasing the apparel is to others, brand name, appropriateness for campus wear, price, style, coordination with other clothing	College Students	Apparel	7 Point Rating Scale
Kim (2001)	Academic	Ethnic group, product, informational influences, store image, store convenience	Consumers	Apparel and Electronics	5 Point Rating Scale
Kulkarni (1995)	Academic	Customer Oriented Properties (aesthetics) Comfort, color, style and tactile properties of fabric Consumer Oriented Properties (performance) Fabric weight, crease retention, color fastness to washing and light	Unidentified	Apparel	Unidentified
Oliver (1985)	Academic	Color, style, fabric, price	Newly-married couples	Apparel	Lists
Thomas, Cassill & Forsythe (1991)	Academic	Apparel involvement, demographics, fiber information sources	Consumers	Apparel	Rating Scales

The U.S. Hispanic Market

According to the 2000 U.S. Census, there were 32.8 million Hispanics living in the United States, accounting for 12% of the U.S. population (U.S. Census, 2000). Hispanics are now the largest minority group in the U.S. (Schmidt, 2003). Furthermore, U.S. residents of Hispanic origin are expected to make up 13.3% of the U.S. population in 2005 and 15.8% of the population by 2015 (U.S. Census, 2002). Discrepancies in numbers exist between some reports because the Hispanic community is growing so quickly. Georgia has the fastest-growing Hispanic population of all U.S. states, followed by North Carolina, Nevada, Kentucky and South Carolina (Armas, 2003). It is noteworthy to mention that the terms Latino and Hispanic are used interchangeably in the 2000 Census study and in others, which adds additional complexity to the accuracy in the total population count.

As seen in Figure 2, the Hispanic population is not homogeneous in terms of origin. Also, income, education, and family characteristics tend to vary between groups of Hispanics, and patterns of differences are often linked to the country of origin (Paulin, 2003; Schmidt, 2003). This leads to the emergence of different markets and submarkets within the Hispanic consumer market. Herbig and Yelkur (1997) suggest that there is insight in comparing different groups of Hispanics, as well as comparing Hispanics as a whole to other nonHispanic groups (e.g. Whites, Blacks and Asians).

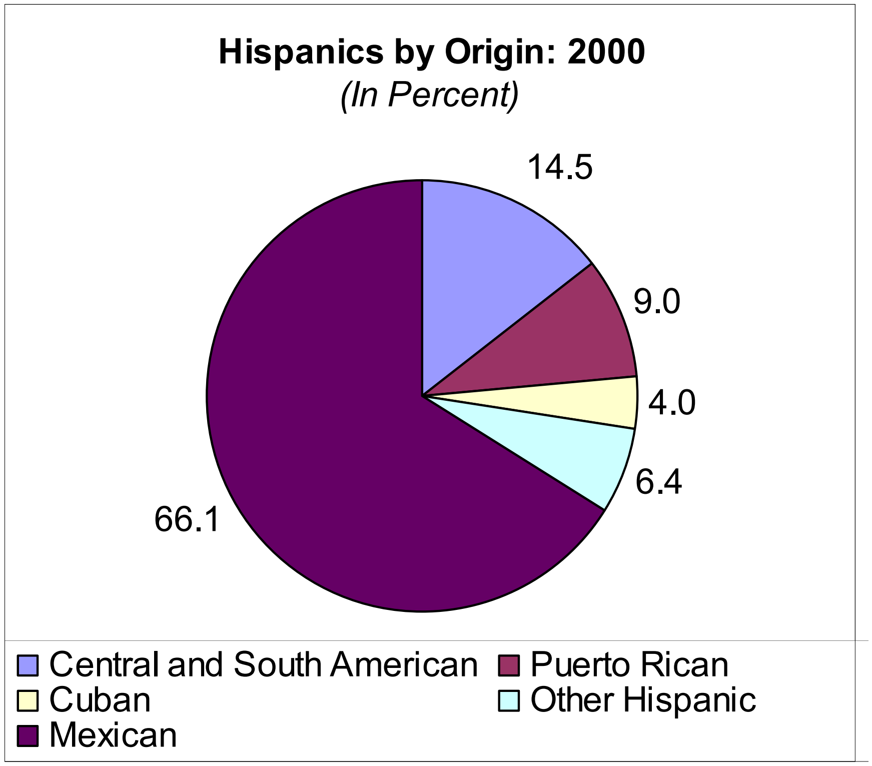

Figure 2. Hispanics by Origin: 2000. From U.S. Census Bureau, Current Population Survey, March 2000.

In regard to education, Hispanic students are making up more of the student population at universities around the country (Schmidt, 2003). Hispanics currently account for 9.5% of students at higher-education institutions, and this figure is expected to rise dramatically as the large population of Hispanic children reaches college age (Schmidt). As of 2003, more than 240 colleges in the U.S. (including Puerto Rico) have been designated “Hispanic-serving institutions,” and have a student population of at least 25% Hispanics (Schmidt). However, not all Hispanic groups are entering college at the same rate. Hispanics of Cuban descent are just as likely as their White counterparts to go to college, while Hispanics of Mexican decent attend college at about half the rate of White people of the same age. Hispanics of any origin are more likely to graduate from high school and attend college if they were born in the U.S. than if they were born abroad.

Income and Buying Power

Companies are trying to capture the $500 billion-plus buying power of the Hispanic market (Kmart Corporation, 2002). Hispanic buying patterns are already being observed. For example, the U.S. Department of Labor indicates that Hispanics spend more on furniture and footwear compared to nonHispanics (Dybis, 2003). Because the buying power of the Hispanic community is increasing rapidly, marketers are looking for ways to get their products to the Hispanic buyer. Between 2000 and 2007, Hispanic consumer spending is expected to grow from $490.7 billion to $926.1 billion (Holmes, 2003). It should be noted that there is a similar amount of variation in average income for Hispanic household as compared to the average incomes of other groups (U.S. Census, 2003), and the number of Hispanic households in the U.S. are increasing.

Advertising to Hispanic Markets

TV networks are a promising outlet for reaching Hispanic consumers, and companies are realizing this. Even during economic slowdowns, advertisers continue their marketing to Hispanic consumers because the Hispanic market is growing and highly desirable (Webster, 2001). The 2000 census was partly responsible for the latest surge in advertising to Hispanics via Spanish-language television stations. The census opened many marketers' eyes to the growth of the Hispanic market. Spending on Latino TV increased by 15 % in the second quarter of 2003 (Mucha, 2003). Even when most marketers might reduce advertising budgets for the majority of their products due to an economic slowdown, Spanish-language TV networks continue to benefit from product advertisements because marketers want to reach the growing population of Hispanics (Webster). This information is key to U.S.

manufacturers and retailers of home textile products, especially those targeting Hispanic consumers.

Herbig and Yelkur (1997) report that U.S. corporations are aware of the growing Hispanic market and the increasing buying power of that market. Herbig and Yelkur cite Hispanic demographics and the manner in which Hispanics are portrayed by advertisers. There are three main mistakes made by marketers when trying to reach Hispanics. The most frequent is the inclination to treat the Hispanic market as a part of the nonHispanic White market. The marketing strategies that are proven to work with existing markets need to be modified to be effective with Hispanics. Second, the Spanish language must be understood to ensure that messages are correctly translated, and direct translations must be examined for alternative colloquial meanings. Finally, distinctions must be made between different Hispanic groups from different areas of origin. Different Hispanic groups will have different demographic factors that affect their preferences, including income, education and family characteristics.

As the home textile industry experiences a general shift towards being fashion forward, market segmentation will increase as Hispanic consumers demand new styles. Identifying Hispanic consumer preferences for home textiles will allow manufacturers and retailers of home textiles to adapt their current and new product offerings to capitalize on fashion trends and consumer preferences.

Hispanic Buying Behavior

Mulhern and Williams (1994) investigated Hispanic shopping behavior to determine if store-level retail sales in areas with high concentrations of Hispanics of Mexican decent were consistent with purchase behaviors described in self-reports of the same population.

Hispanics of Mexican decent were chosen as the population of interest because Hispanics of Mexican decent make up two-thirds of Hispanics in the U.S.. The researchers tested hypotheses related to price sensitivity, brand substitution, store brands, and national brands. Using retail scanner data from grocery stores, market response models were estimated for market areas with very high concentrations of Hispanic consumers, and separate market response models were estimated for areas with very low concentrations of Hispanic consumers. The two market response models were compared. Price responsiveness was found to be substantial in Hispanic markets, but was not consistently higher than in nonHispanic markets. Brand substitution was hypothesized to be less in Hispanic markets, but was not found to be statistically different than in nonHispanic markets. Most interestingly, and contrary to other research, Mulhern and Williams found that the Hispanic areas did not have any more of a national brand preference than the nonHispanic markets in this study. This refutes the common assertion that Hispanic consumers are more brand-loyal than other consumer markets.

Kotler (2000) points out that the U.S. Hispanic subculture has grown large enough to account for a distinct market and warrants specialized marketing programs. Kotler also highlights that the Hispanic market is segmented by level of acculturation. For example, Chicago and Miami are two of the top five Hispanic markets in the U.S., but the less-acculturated Cuban-American population of Miami demands different products than the highly-acculturated Puerto Rican population of Chicago. Less-acculturated markets have a higher demand for traditional foods including canned sliced cactus and fried plantains.

Solomon and Rabolt (2004) describe a variety of ways to segment the Hispanic market. Like other markets, the U.S. Hispanic market can be segmented by age, but it is important to note that the Hispanic market is a relatively young market—the number of Hispanic teens is expected to increase at six times the overall rate of teen growth. Like other authors, Solomon and Rabolt distinguish between Hispanics of different countries of origin. For example, Cuban Americans are different than Mexican Americans in that they tend to be wealthier than other segments, but make up a relatively small proportion of Hispanics. Mexican Americans are the largest proportion of Hispanic Americans and often have larger household sizes.

Marketing Efforts towards the Hispanic Market

Kmart is trying to cater to its Hispanic demographic, which accounts for 17% of Kmart's sales, with a new apparel line (Kmart spices up apparel mix, 2003). The exclusive Kmart brand, Thalia, is designed to appeal to Hispanic consumers of women's and girls' apparel from teens to middle-aged adults (Scardino, 2003). Attracting more Hispanic consumers with an apparel line could help increase Kmart's penetration of Hispanic markets and lead to increased sales of other profitable merchandise. This investment may give Kmart a strategic advantage over other mass-merchandisers like Target and Wal-mart by being the first to attract the Hispanic audience (Dybis, 2003).

Thalia's Misses size apparel products range from t-shirts with Spanish-language logos to trendy, brightly colored apparel, which are much different than Kmart's standard apparel offering. Thalia product lines currently include a home textile line and women's and girls' apparel including footwear, accessories, and lingerie. The home goods line consists of five collections and includes bedding (ensembles contain a comforter, shams, bed skirt and sheet set), and bath (bath towels, hand towels, wash cloths, shower curtains, bath rugs and nontextile accessories) as well as a valance and small table cover for each collection. The five home collections vary slightly in their product offerings (not all collections include all bedding and bath items), and consist of the Apasionado, Flamenco, Peacock Feathers, Sangria and Safari collections. The Safari collection features black and white patterns including zebra stripes; other collections have bold colors or vibrant bright patterns.

The Thalia brand is based on a partnership with Latina singer Thalia Sodi. The brand will be exclusive to Kmart stores, supplementing their existing collection of exclusive brands (Kmart Corporation, 2002). Kmart's brand-dependent strategy has worked well with its Martha Stewart Everyday and Joe Boxer brands, both exclusive to Kmart. The July 2002 launch of Joe Boxer is credited with helping Kmart emerge from bankruptcy (Scardino, 2003).

Kmart's careful look at the true buyers of these trendy clothes is a strong indication that the product will succeed. Another strong approach is Kmart's dedication to becoming a "Store of the Neighborhood" (Scardino, 2003). To help target the most profitable consumers for the Thalia line, it is only being offered in select stores where Hispanic consumers are expected to patronize most. As of mid-2003, Thalia lines were only offered in 335 of Kmart's more than 1500 stores (Scardino).

Kmart is not the only company targeting apparel directly at Hispanic consumers. Sears, the nation's largest chain of department stores, is offering a women's apparel line under the name of a well-known Hispanic celebrity (Mucha, 2003). Cuban-American Lucy Pereda is the host of a popular Spanish-language TV show, En Casa de Lucy, and has been called the Hispanic Martha Stewart (Yue, 2003). Sears has already been courting the Hispanic community with Nuestra Gente, a Spanish-language quarterly magazine. Nuestra Gente has featured articles authored by Pereda (Mucha).

In contrast to Kmart's Thalia label, the Lucy Pereda line is targeted at Hispanic consumers older than 25 (Yue, 2003). The new line is sensible but very feminine, with brighter colors to appeal to the Hispanic market.

The Lucy Pereda line currently available in 227 Sears stores—those that are Hispanic-designated (Lisanti, 2003) as well as in additional stores in Puerto Rico (New Sears apparel licensor looks toward home, 2003). Hispanic-designated stores are those Sears stores in areas where the population is at least 15 % Hispanic. Because the line is presently limited to Hispanic-designated stores, it is only available in 22 states (Yue 2003). By spring 2004, the collection will be introduced to general markets for a total of 450 stores (New Sears, 2003). The next step for the Lucy Pereda line will be a home collection focusing on home textiles. The home collection is expected to be in stores in 2004 or early in 2005 (New Sears, 2003).

Summary

The literature for buyer behavior reveals that price, style, size/fit, color, fabric, brand name and country of origin appear to be the most frequently tested variables in studies related to consumer purchase behavior for apparel. These variables will be used as part of the framework in exploring consumer preferences for home textile products. The literature also demonstrates that the rapidly expanding Hispanic consumer population is well-documented by governmental, academic, and news sources. Based on existing research in the apparel industry, the U.S. Hispanic market is one in which an academic focus for consumer preferences for home textile products is warranted and will have implications for home textile manufacturers and retailers who are attempting to provide differentiated products to meet the needs of the U.S. Hispanic market.

CHAPTER III

Research Methodology

The purposes of this study were to define the U.S. home textile industry by constructing an industry profile, and to explore the buyer characteristics and decision factors that may influence U.S. Hispanic consumers as it relates to their preferences for home textile products. Consumer preferences for apparel have been researched extensively for many years (Eckman, Damhorst & Kandolph, 1990; Hsu & Burns, 2002; Kulkarni, 1995; Thomas, Cassill & Forsythe, 1991; Workman & Kidd, 2000). Concepts from the body of knowledge of apparel purchase decisions were applied to this study to understand Hispanic consumers' preferences for home fashions. Understanding home textile purchase decisions for specific markets is especially important in the current home textile industry as manufacturers and retailers of bed and bath products increasingly participate in product differentiation as competitive strategies.

Research Objectives

There are fourteen research questions, segmented by the two main research objectives.

- Research Objective One: To profile the U.S. home textile industry by exploring the manufacturing and specialty retail leaders of bedding and bath products.

  <u>Research Question One</u>: Who are the leading manufacturers in the U.S. home textile industry? What are their respective approaches to

  a. Customer

  b. Product

  c. Market Strategy

Research Question Two: Who are the leading specialty retailers of bedding and bath products? What are their respective approaches to

a. Customer

b. Product

c. Market Strategy

- Research Objective Two: To ascertain the level of importance that traditional buyer decision factors such as price, color and style have within the Hispanic consumer market for home textile products.

Research Question Three: How important is price when deciding upon home textile products (bedding and bath)?

Research Question Four: How important is color when deciding upon home textile products (bedding and bath)?

Research Question Five: How important is style when deciding upon home textile products (bedding and bath)?

Research Question Six: How important is brand name when deciding upon home textile products (bedding and bath)?

Research Question Seven: How important is fiber content when deciding upon home textile products (bedding and bath)?

Research Question Eight: How important is the availability of packaged product sets when deciding upon home textile products (bedding and bath)?

Research Question Nine: How important is fabric type when deciding upon bedding products?

Research Question Ten: How important is thread count when deciding upon bedding products?

Research Question Eleven: How important is coordination of bedding? How important is coordination of bath products? How important is coordination between bedding and bath?

Research Question Twelve: What is the preferred retail channel for purchasing home textile products? What is the most frequently used retail channel?

Research Question Thirteen: Does the retail market make available home textile products that satisfy the preferences of specialty markets?

Research Question Fourteen: Does the level of importance for bedding and bath criteria differ based on the consumer's cultural influence?

Research Design

The research design follows an operationalized version of Kotler and Armstrong's (2001) Buyer Behavior Model, shown in Figure 3. The marketing and other stimuli are shown as characteristics of both the manufacturer and specialty retailer. It is important to include both the manufacturer and the retailer in the description because they may influence the consumer in different ways. The black box contains information about the subjects of the study, and the buyer response box identifies the variables that were evaluated in their level of importance.

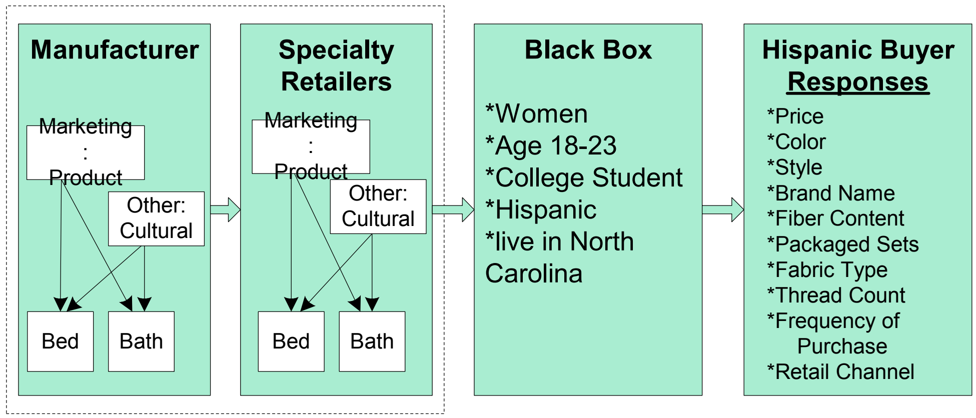

Figure 3. Operationalized Model of Buyer Behavior. Adapted from Kotler & Armstrong 2001.

First described in Figure 1, the most important feature of the marketing stimuli for the purposes of this study is the marketing of the product, while the most important of the “other” stimuli is the influence of the consumer’s culture. For this study, the buyer characteristics that affect the decision process shown in the “black box” were determined by the sample. The buyer responses in the final box reflect the preferences indicated by the respondents of the survey.

A case study methodology, using Yin’s (2003) convergence of evidence approach was selected as the framework to study the consumer buying preferences in home textiles. No prior empirical research has been conducted in this area thus this research provides a foundation for future study.

The convergence of evidence approach (Yin, 2003) identifies six of many potential sources of information from which to draw information for a case study: archival records, documents, observations (direct and participant), structured interviews and surveys, focus groups and open-ended interviews. As illustrated in Figure 4, four sources of evidence are used: archival records, observations, documents and structured interviews and surveys.

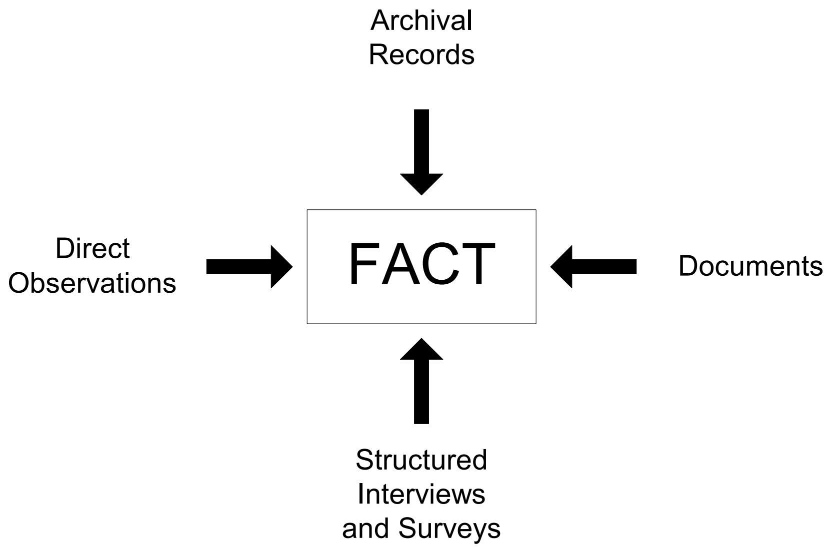

Figure 4. Convergence of Evidence Approach. Adapted from Yin (2003).

The four sources of evidence used in this study describe the U.S. home textile industry on the whole instead of identifying four separate topics. In order to fully describe the U.S. home textile industry, the industry, retailer and consumer aspects must all be addressed. Although different sources of evidence were used for the different objectives of this study, using these four approaches together establishes a framework for understanding the home textile industry and for establishing a basis for understanding consumer preferences for home textile products.

Research Objective One

Archival records, documents and direct observation were used to answer Research Objective One, which created a profile of the U.S. home textile industry. As part of Research Objective One, Springs Industries and WestPoint Stevens were evaluated as the two leading home textile manufacturers using archival data and documents. Bed Bath & Beyond and

Linens ‘n Things, the two leading mass specialty retailers, were evaluated and compared using archival records, documents and observation.

Archival records that are used in this study are among the sources indicated as appropriate by Yin (2003) and include maps and charts (geographic information system, or GIS), lists of names (gathered from university organization websites) and census records. Yin specifies that documents may include formal studies (existing academic studies) and periodical articles. Documentation can be reviewed repeatedly, and it includes a broad coverage of time and topics, but can be subject to reporting bias (Yin). One major benefit of archival records is that they are stable sources of information that can contain precise quantitative data. However, archives may be made deliberately inaccessible due to privacy interests. Structured interviews were used in two instances in the course of this study. A designer at Springs Industries was interviewed by phone and a survey was designed to gather information from Hispanic women. Interviews and surveys collect data specific to the topic of study and allow for emergent information, but may be subject to response bias. Direct observations were used to gather information about Bed Bath & Beyond and Linens ‘n Things stores to collect data about the stores’ operations and to evaluate the availability of merchandise that reflected the preferences indicated in the survey. Direct observation is a strong tool, and provides coverage of topics in the context of the study. The strength of direct observation can be limited by selectivity if broad coverage is unavailable (Yin).

Research Objective Two

Research Objective Two uses a survey to gather information from research subjects. The questionnaire instrument was developed by the researcher using variables established in the Review of Literature (Appendix B), and includes demographic questions and questions about home textile preferences. The questionnaire was developed to answer Research Questions Three through Fourteen, which satisfy Research Objective Two. Using the results of the questionnaire, observation was used to observe the availability of products in mass specialty retailers of home textiles with the characteristics identified during the questionnaire phase of the research. Table 3 identifies each source of evidence and the research objectives and research questions they are used to answer.

Table 3: Summary of Resources Used for Convergence of Evidence

Source of Evidence	**Resources**	**Research Objectives**	**Research Questions**
Archival Records	Compiled financial and industry data	RO 1	RQ 1 RQ 2
Documents	Web sites Trade articles Academic articles	RO 1	RQ 1 RQ 2
Observation	Visits to retailers	RO 1, RO 2	RQ 2 RQ 12
Survey	Questionnaire instrument developed by researcher	RO 2	RQ 3-14

Instrument

A questionnaire was developed as the data collection tool for the survey procedure. Table 4 shows the relationship between the questionnaire instrument items and the research objectives and research questions.

Table 4. Survey Questions by Research Objectives and Research Questions

Instrument Question	Research Objective	Research Question
1, 2a-c	2	12
3, 6h, 7f	2	8, 13
4a-b	2	11, 13
6a, 7a	2	3, 13
6b, 7b	2	4, 13
6c, 7c	2	5, 13
6d, 7d	2	6, 13
6e, 7e	2	7, 13
6f	2	9, 13
6g	2	10, 13
8a-f	Demographic Information	
9a-b	2	13
9c	2	14

The quantitative data were collected in the first eight of nine questions. The importance of decision factors and the respondents' preferences for bedding were gathered using Questions 6a-g, 3, 4a and 8a. The level of importance of bath product preferences was collected with questions 7a-f, 4b and 8b. The responses were on a Likert scale of 1 to 5, with 1 being identified on the questionnaire as NOT IMPORTANT, and 5 being assigned the value VERY IMPORTANT. The odd number of options in the ordinal scale for each of the questions allows for 3 to represent no strong preferences, or a neutral level of importance. The intermediate numbers 2, 3 and 4 were assigned meanings of LESS IMPORTANT, NEUTRAL, and

MORE IMPORTANT, respectively, for the purposes of analysis. Question 5 investigated the importance of integrating coordinated bedding and bath products. The retail channel preferences were investigated in Questions 1 and 2a-c. Demographic results were also gathered using qualitative responses in Questions 8c-f. Qualitative data about the preferences were collected in the last two questions (Questions 9a-c and 10), which asked first about bedding preferences, then bath preferences, and how the respondent felt her cultural heritage affected those preferences. Question 10 requested general comments and feedback about the study.

Retail Channels for Bedding and Bath Products

Question 1 addresses which retail channel is most frequently shopped by Hispanic consumers for bedding and bath products. The measurement of the scale is: discount, department store and specialty, with examples provided for each channel. Question 2 asks respondents to identify their preference for shopping at each type of retail channel (discount, department and specialty). For Question 2, a five-point Likert scale was used to capture respondent preferences with 1 representing LEAST PREFER and 5 representing MOST PREFER. Question 3 addresses subjects' preferred way to purchase bedding products in terms of packaging. Subjects were given a choice of "Individual Items," where flat sheets, fitted sheets and pillowcases are sold separately; "Packaged Set," where flat sheets, fitted sheets and pillowcases are sold together; and "Bed-in-a-bag," where the three products, a comforter and bed skirt are sold as one unit.

Coordinated Bedding and Bath Products

Questions 4a, 4b and 5 address the respondent's perceived level of importance for coordinated themes or collections of bedding products and bath products separately, and for coordinated items for bedding and bath products together. For each question, the subjects were asked to respond to a five-point Likert scale that ranged from 1 (NOT IMPORTANT) to 5 (VERY IMPORTANT).

Buyer Decision Factors for Bedding

Questions 6a-h address subjects' perceived level of importance for price, color, style, brand name/designer, fiber content, fabric type, thread count and the availability of packaged sets. Fiber content, fabric type and thread count were followed by examples for clarity. Each factor was measured on a five-point Likert scale that ranged from 1 (NOT IMPORTANT) to 5 (VERY IMPORTANT).

Buyer Decision Factors for Bath Products

Questions 7a-f address subjects' perceived level of importance for price, color, style, brand name/designer, fiber content and the availability of packaged sets. Each factor was measured on a five-point Likert scale that ranged from 1 (NOT IMPORTANT) to 5 (VERY IMPORTANT).

Demographics

Questions 8a and 8b inquired about the number of times per year the respondent purchases bedding (8a) and bath (8b) products. The questions had an ordinal scale of five options with one being designated as "less than 1 [time per year]," two being designated as "two [times per year]," three being designated as "three [times per year]," four being designated as "four [times per year]" and five being designated as "more than five [times per year]." The rationale for including the 8a and 8b was to establish a pattern of buying behavior. Questionnaire items 9a through 9c were open-ended questions that allowed the respondents to offer their own preferences in addition to those expressed in other questionnaire items. These questions were formulated to answer Research Questions Thirteen and Fourteen, which address the availability of products satisfying the preferences of the Hispanic market and the effect of the consumer's cultural influence. The expressed preferences of the subjects were compared to the current offerings available in retail outlets.

Questions

There were three types of questions on the questionnaire. Multichotomous questions (Questions 1, 3, 8 d, 8 e, and 8 f) asked the respondent to choose the item that best described them or their preference. Questions 2 a - c, 4 a - b, 5, 6 a – h, 7 a – f and 8 a –c were presented in a Likert scale with 1 being NOT IMPORTANT (or LESS OFTEN) and 5 being VERY IMPORTANT (or MORE OFTEN). Questions 9a–c and Question 10 were open-ended questions.

Survey Data Collection

Initially, the questionnaire was intended to be administered in paper form during meetings of university-affiliated groups at a number of universities in North Carolina. But because the data collection process took place near the end of a semester, many groups had no scheduled meetings for the next several months, or expected reduced attendance at their scheduled meetings. To overcome this lack of accessibility to research subjects, an on-line version of the questionnaire was developed to capture the data.

Pretest of Instrument

Before the questionnaire was administered to the subjects of the survey, it was tested on six nonHispanic and two Hispanic pilot subjects. Throughout the course of the pilot study, questions were adjusted if pilot subjects reported that the questions were unclear or hard to answer. Adjustments that were made include:

- Store names for each retail channel—discount (Wal-Mart, Kmart, Target), department (Sears, JCPenney, Nordstrom), and specialty (Bed Bath & Beyond, Linens 'n Things)—were added to clarify the retail channels in Question 1.
- Item 3 on the questionnaire was defined with examples of individual items (single fitted sheet sold separately from flat sheet and pillowcase), packaged set (flat sheet, fitted sheet and pillow case sold together) and bed-in-a-bag (includes sheets, pillowcase, comforter and bed skirt).
- The format of Question 2 of the questionnaire was changed to allow respondents to describe their preferences for each channel of distribution, regardless of their answer to question one.
- The phrasing of Question 5 was changed to include the word "between" to distinguish the coordination between bed and bath products from coordination of the products in bedding only or bath only.
- Examples were added to describe fiber content, fabric type and thread count in Questions 6e, 6f and 6g, and fiber content examples were added to question 7e. The examples were included because some of the pilot subjects indicated they did not know what the terms meant, and suggested that less technical terminology be included.
- The responses for Questions 9a and 9b were changed from multichotomous to open-ended questions to gather less-biased information from the questionnaire subjects. The

pilot study prepared the questionnaire instrument to effectively gather information from the sample of Hispanic women.

After the online version of the questionnaire was developed, another pretest with seven subjects took place. No rephrasing was necessary, but several changes to the alignment and page format took place, including adjustments to the wrapping of text and centering of radio buttons. The subjects of the online pilot study included three of the pilot subjects from the first pretest in addition to four new subjects who had not participated in the first pretest. The second pilot study did not include Hispanic subjects.

Survey Sample

As home textile companies focus more on the college side of back-to-school, more information is needed to understand how college students make decisions about home textiles. Of the $25.8 billion spent on back to college preparations in 2003 (National Retail Federation, 2003).

College students have been used as subjects of a convenience sample in existing published textile-related studies. For example, Lee, Kunz, Fiore, and Campbell (2002) studied merchandising issues associated with consumer acceptance of mass customization of apparel. The purpose of the research was to identify the type of apparel and the apparel features that customers want to customize, preferences in customization processes and where the customer would like to participate in the mass customization process. A convenience sample of 131 college students was used to identify subjects for the study. College students were chosen because they are comfortable with technology and are highly involved with apparel and shopping. The data-gathering instrument was a quantitative survey-type collection of questions. The responses of that study were analyzed using descriptive statistics, t-tests, McNemar tests, ANOVA and Bonferroni multiple comparisons.

Targeting college students for the back to school season is becoming more common for home textile retailers, and there is increasing competition for the market. According to the National Retail Federation, consumers spent approximately $25.8 billion in their back to college preparations in 2003. Of the $25.8 billion, $11.3 billion was spent by college students (National Retail Federation, 2003). Trendy product offerings are being modified to appeal to college students (LNT Registers at BTS, 2003) and fit their dormitory needs (Rohrlich, 2003).

For this study Hispanic college students were targeted, and the sampling method was a nonprobability convenience sample using the snowball approach—that is, eligible subjects from Hispanic/Latino university organizations were asked to respond and forward the questionnaire to other eligible subjects (Churchill & Iacobucci, 2002). Salant and Dillman (1994) specify that, when no list from which a sample may be drawn is available, a list may be compiled from several sources. There was no publicly available list of Hispanic women at North Carolina universities. In this research, the web pages of universities in the North Carolina piedmont area were searched for Hispanic, Latino or multicultural student organizations. Seventeen organizations Hispanic or multi-cultural organizations were initially identified. Originally, a paper version of the questionnaire was developed and the seventeen groups were contacted via email with a request for the researcher to attend a meeting to administer the questionnaire. From that list, thirteen organizations responded and, of those responding organizations, three declined to participate. Five of the first seventeen groups contacted indicated that they had no scheduled meetings for the remainder of the semester, but would be willing to participate remotely. Due to the low accessibility of the groups, the online version of the questionnaire was developed and the groups were contacted again with a request that they distribute a link to the questionnaire. Because the second contact regarding the online version of the questionnaire was made one week after the original email, it served as a follow-up communication.

Three of the responding groups agreed to send a link to the online questionnaire to their organizations' listservs, and an additional three groups agreed to forward the information to additional members of their organizations, but the formal listserv information was not provided to the researcher. Several responses were obtained from members whose organizations did not initially respond, indicating that the snowball method was relatively effective in identifying desired participants.

After the online version of the questionnaire was developed, additional groups were contacted because there was more geographic flexibility, as the researcher would not be required to visit each group. In the process of locating additional student organizations, one diversity office was identified and contacted, and responded with a list of possible participants' email addresses. No additional responses were received from the organizations that were contacted after the data collection process began. Because no response to the researcher was necessary for participation in the questionnaire, and because the number of members of each listserv was not revealed to the researcher, the response rate was could not be determined. By the end of the eleven-day data collection period, 30 responses had been gathered. One hundred percent of the responses were useable.

Retailer Observation

Store Sample

Analysis of the survey data provided an understanding of the preferences of the survey sample. To ascertain the availability of products matching the preferences expressed in the survey, the researcher used the direct observation technique in the visits to Bed Bath & Beyond and Linens 'n Things, the two largest mass specialty retailers of home textile products. Three cities in North Carolina were chosen for store observation. Because the target survey sample was comprised of subjects in the Piedmont of North Carolina, the three cities chosen were Raleigh, Greensboro and Charlotte. There were three of each store in Raleigh and Charlotte and one of each store in Greensboro. To determine which of each store to visit in Raleigh and Charlotte, a geographic information system (GIS) was used. Using GIS, the exact latitude and longitude of each store was plotted, and the program used U.S. Census data to determine the size of the Hispanic population within a 10-mile radius of each plotted point. The stores near the highest Hispanic population were noted and visited for observation.

In-Store Observation Procedure

Based on the results of Questions 9a and 9b of the questionnaire, data collection sheets were created to gather information about product availability in the bedding (Appendix C) and bath (Appendix D) areas of each store that was visited. To gather information about the availability of bedding, products with the expressed preferences for color, patterns, fiber content, thread count, fabric type and labeling were sought in both packaged sets and bed-in-a-bag packaging. To gather information about the availability of bath products, products matching the expressed preferences for color, patterns, fiber content and labeling were sought in the towel, rug and shower curtain categories. Visual observation of the products on the sales floor was used to determine which items were available. Items matching the criteria gathered in the survey were marked as available or unavailable.

Data Analysis

Data analysis was completed in different steps for each research objective. For Research Objective One, data on the U.S. home textile industry was collected. The industry was described broadly, and the two leading manufacturers and two leading specialty mass retailers were identified and described in more detail with respect to their customers, products and market strategies. For Research Objective Two, the results of the questionnaire were collected. The quantitative responses were evaluated using descriptive statistics. One-sample t-tests were used for Questions 2a-c, 4a-b, 6a-h, 7a-f and 8c to see if there was a significant preference for a given criteria. An informal null hypothesis was formed for each question tested with the t-test; M=3. One sample t-tests are often used by market researchers to make statements about a single variable against a standard (Malhotra, 1999, p. 471). Qualitative, open-ended responses were coded by the most common responses. A one-way ANOVA test was run post hoc to determine if segmenting the respondents by whether they thought their culture influenced their preferences (Question 9c) would explain differences in their rating of the importance of Questions 6a-h and 7a-f and differences in their level of fashion interest (Question 8c). An alpha level of .05 was used for all statistical tests. Finally, a product scan was conducted at three locations of each Bed Bath & Beyond and Linens 'n Things store to determine if products satisfying the expressed preferences of the questionnaire subjects were available in the current retail setting.

Table 5. Operational Definitions

Term	Definition
Bath	Towels, shower curtains, bath rugs and related bath accessories.
Bedding	Flat sheets, fitted sheets, pillowcases, comforters, bed skirts.
Buying decision factors	Price, color, style, brand name/designer, fiber content, availability of packaged sets, fabric type, thread count, retail channel.
Buyer characteristics	Hispanic or Latina (self-described) college student in North Carolina above the age of 18.
Home textiles	Bedding and bath products.
Home textile manufacturer	WestPoint Stevens and Springs Industries.
Home Textile Mass Specialty Retailer	Bed Bath & Beyond and Linens ‘n Things.

CHAPTER IV

Results

This study defines the U.S. home textile industry by means of an industry profile and explores the preferences U.S. Hispanic consumers have for home textile products, specifically bedding and bath. In the first of two parts of data collection, industry information was gathered from published sources. In the second part of data collection, a questionnaire was administered to Hispanic subjects. Using known variables for consumer preferences for apparel and pairing them with variables unique to the home textiles market, this study explored the relative importance Hispanic consumers place on traditional purchase variables when shopping for home fashions, an area in which no academic research had been conducted. This research provides a foundation for future research in an emerging area of consumer study for home textiles, in general and based on market segmentation.

Research Objective One: To Profile the U.S. Home Textiles Industry by Exploring the Manufacturing and Retail Leaders of Bedding and Bath Products

Home textiles manufactures and retailers of bed and bath products are undergoing changes to differentiate products and target products to specific markets. Current trends in the bedding industry include innovative fiber blends, such as including silk in sheets and the coordinating decorative pillows and curtain panels (Sloan, 2003). Other fiber-related innovations include using wicking technology that has been developed for apparel to increase the comfort of bedding. Higher thread counts in sheets are being used to impart a luxury feel and image (Silverstein & Fiske, 2004). Private labels, which are labels owned by the retailer, are becoming more common in retailers and have been reported to be especially effective in bath textiles (Duff, 2003). Private labels will be discussed in detail in the following section.

Product Market Shares

The U.S. home textile industry produces a wide variety of products, as shown in Table 5. However, the focus of this study is on bedding and bath products. Home textile products are simpler and less time- and labor-intensive to manufacture than apparel products, which may give the U.S. textile industry an area in which to establish new competitive advantages. Increased mechanization can be used to facilitate lower priced products for volume producers and discounters who compete on cost, as well as enable differentiation based on quality and product variety.

In terms of production, 62% of the 2001 bathroom product market was produced domestically (Lazich, 2004). Bath towels made up more than half the sales of the bathroom product market, accounting for 55% (Lazich) of 2002's $2.8 billion in bathroom product sales (Corral, 2003a), as shown in Figure 5. Bath accessories, such as ceramic counter items, are considered nontextile products, and tank sets, which are considered textile products, include toilet tank and lid covers and matching contour rugs.

Table 6. Home Textile Product Categories

Bed	Bath	Kitchen	Other
Blankets	Bath Accessories	Kitchen Textiles	Rugs
Comforters	Bath Rugs	Table Linens	Window Coverings
Curtains/ Draperies	Bath Towels		
Decorative Pillows	Shower Curtains		
Down Comforters			
Foam Pillows/ Toppers			
Mattress Pads			
Quilts			
Throws			

Note. Sources: A year of Change, 2004;The Facts: Kitchen Textiles, 2003.

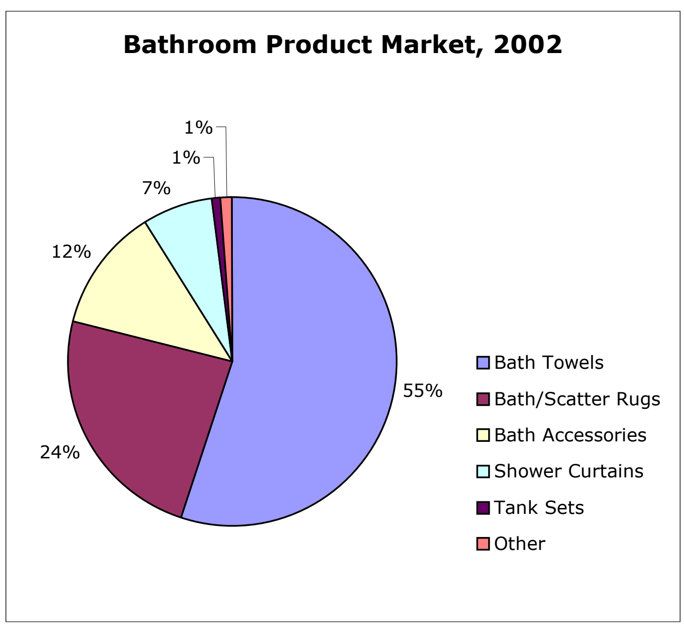

Figure 5. Bathroom Product Market, 2002. Adapted from Lazich, 2004

Bedding market sales in 2002 were led by sheets/pillowcases (Lazich, 2004), which have shown a recent trend towards higher-priced products such as high thread counts and luxury fiber blends (Schwartz, 2003). Figure 6 illustrates the 2002 bedding market sales.

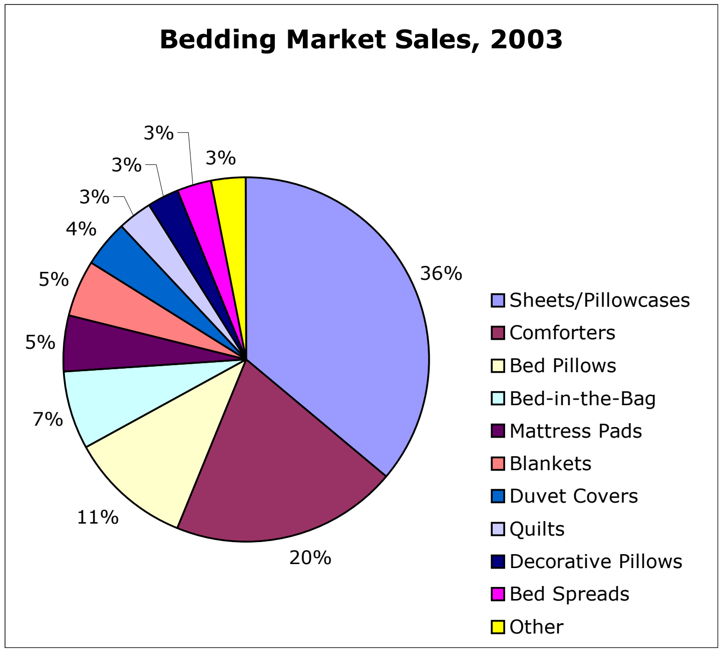

Figure 6. Bedding Market Sales, 2003. Adapted from Lazich, 2004

Bedding is an area where consumers are willing to pay more for high quality products (Silverstein & Fiske, 2004). Manufacturers and retailers are using thread count, fiber content and branding strategies to differentiate their products. Thread count refers to the number of horizontal and vertical yarns woven into the fabric. Generally, sheets with higher thread counts have a softer hand. According to a Detroit Free Press article (Angel, 2001), there are four ranges of thread counts; less than 200 can be considered “low”, 200-220 is considered “good,” 230-280 is considered “better,” and thread counts of higher than 300 threads per inch are considered “best.” Observation of home textile specialty retailers showed that fibers used in sheets include cotton (including pima and Egyptian cotton), silk, polyester, and a variety of manufactured cellulosic fibers made from trees (including lyocell, beech and modal;

Hatch, 1993; Tondl, 1997). Branding strategies range from lower-priced store brands like Linens 'n Things' "LNT" to high-priced designer bedding from Nautica and Tommy Hilfiger.

Home Textile Manufacturers

The goal of Research Objective One is to profile the manufacturing and retail leaders in the bed and bath category of the U.S. home textile industry. The home textiles industry is in a period of aggressive change (A year of change for top 5 players, 2004). The exit of Pillowtex left the potential for other manufacturing companies to gain new market share, and the exit had the most impact on the basic bedding categories (A year of change). At the end of 2003, the top five vendors according to Home Textiles Today were Springs Industries, WestPoint Stevens, Mohawk Home, Dan River and Pacific Coast Feather (See Table 7). Springs Industries and WestPoint Stevens are discussed in greater detail because they represent the largest companies in the U.S. home textile manufacturing industry for bedding and bath products.

Table 7. The Top 10 Home Textiles Manufacturers of 2003

2003 Rank	Company	Est. '03 Sales ($Mil)	% of Total
1	Springs Industries	$2,400	36.2
2	WestPoint Stevens	1,656	25.0
3	Mohawk Home	655	9.9
4	Dan River	374	5.6
5	Pacific Coast Feather	353	5.3
6	Croscill	293	4.4
7	Franco Mfg.	237	3.6
8	Maples Rugs	230	3.5
9	Hollander Home Fashions	228	3.4
10	CHF Corp.	195	2.9
	Total	6,621	100.0

Note. Adapted from Top 15 Vendors—2003

The top five U.S. home textile manufacturers account for more than 80% of the top 10 vendors of home textiles, in terms of sales. As shown in Figure 7, Springs Industries and WestPoint Stevens dominate the top five manufacturers. Because these are the two most influential U.S. home textile manufacturers, they are the companies described in Research Question One.

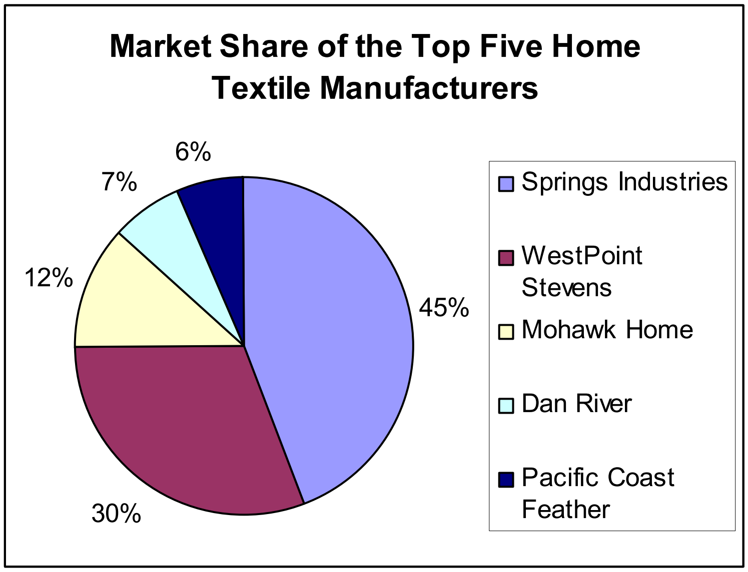

Figure 7. Respective Market Share of the Top Five U.S. Home Textile Manufacturers

Research Question One: Who are the leading Manufacturers in the Home Textile Industry?

Research Question One addresses the leading U.S. home textiles manufacturers. According to the convergence of evidence approach shown in Figure 4, archival records and current documents were used to identify the top ten home textile companies. These top ten companies were evaluated, and the top two were described in detail because they are the most influential companies in the industry based on sales.

Company Development

Originally named Fort Mill Manufacturing Co., Springs Industries began in 1887 (Krippel, 2004c). After undergoing a series of name changes and a number of presidents, Springs became a publicly traded company in 1966 under the name Springs Mills (Krippel, 2004c). The company established its Springmaid bedding line in 1945, began working with Bill Blass in 1970, and acquired Graber industries in 1979 (Krippel, 2004c). These changes helped the company recover from several periods of declining profits (Krippel, 2004c). In 1982, the name was changed to the current Springs Industries (Krippel, 2004c). To recover from a $7 million loss in 1991, Springs expanded its successful home furnishings segment, finally dropping its apparel fabric production altogether in 1999 (Krippel, 2004c). In 2001, Springs became a private company by buying 55% of the stock and partnering with a private equity firm which now owns 45% of the company. Based out of Fort Mill, South Carolina, Springs has around 40 manufacturing plants in 12 states, Canada and Mexico (Krippel, 2004c). Although Springs closed four mills during 2003 (Elkins, 2004), its closings have been limited compared to other textile companies including WestPoint Stevens. According to 2003 estimates, Springs has around 17,000 employees (Krippel, 2004c).

WestPoint Stevens began in the 19th century as Westpoint Manufacturing Company, and merged with Pepperell Manufacturing Company in 1965 to form WestPoint Pepperell (WestPoint Stevens, 2003). WestPoint Stevens took its current form in 1993, when WestPoint Pepperell acquired J.P. Stevens & Co. The three separate companies produced a variety of products throughout their histories including flannel, sail cloth and woolen fabrics (WestPoint Stevens, 2003), but now WestPoint, a publicly traded company, focuses exclusively on bedding and bath products, with special attention to sheets and towels. Since filing for Chapter 11 bankruptcy protection in June 2003, WestPoint has begun to focus more on bedding, which provides a higher profit margin (Krippel, 2004d). Hoovers Company Capsules and Profiles reports that WestPoint employed 13,886 people during 2003 (Krippel, 2004d). Since filing for bankruptcy, WestPoint has reduced its number of retail outlet stores from 57 to 30 (WestPoint Stevens Reports, 2004). WestPoint has also closed a number of manufacturing plants in the last two years, with the current number around 20 (WestPoint Stevens, 2003).

Product Offerings and Customers

Springs Industries was the top vendor of home textiles in 2003 (Top 15 Vendors—2003, 2004), and focused its expansion efforts on increasing volume, particularly in the mass channel (A year of change, 2004). Springs had an estimated sales volume of $2.4 billion in 2003 (Top 15 Vendors—2003, 2004). As shown in Figure 9, Wal-Mart is one of many retail stores where Springs' products are sold. Wal-Mart accounts for about 25% of Springs' total sales (Krippel, 2004c). Springs' 2003 sales growth increased the sales gap between Springs and WestPoint Stevens, which has the next highest sales overall (A year of change). Springs had the highest sales in the industry in bath accessories, comforters, sheets and pillowcases and shower curtains categories, and gained Pillowtex' market share in bath rugs (A year of change). Springs' brand focus include its own popular Springmaid, Daisy Kingdom, and Wamsutta, and it licenses JCPenney Home Collection products as well as NASCAR, Coca-Cola, My Little Pony and Cat in the Hat kids' bedding (Springs Industries, n.d.). About 25% of Springs sales are to Wal-Mart stores, but Springs also sells to catalogs, department stores and other mass retailers as depicted in Figure 9 (Krippel, 2004c).

In the absence of Pillowtex, WestPoint Stevens is now the top seller of down comforters in the industry (A year of change, 2004, Top 15 vendors—2003, 2004). Although WestPoint Stevens went through a bankruptcy filing in 2003, its down comforter category sales increased by 125% (A year of change). Strong licensing partnerships including the Ralph Lauren Home line and Disney Home have contributed to WestPoint Stevens' rebound (A year of change). WestPoint also has strong brands of its own including Martex, Vellux and Grand Patrician. Even in 2002 before the exit of Pillowtex, WestPoint Stevens also led the industry in production of bath towels (Lazich, 2004).

WestPoint Stevens recognizes specialty stores as one of the fastest growing of the retail channels, along with discount retailers and warehouse clubs (WestPoint Stevens, 2003). Notably absent from WestPoint's online description of high-growth distribution channels is growth in the department store market for home textiles. WestPoint's sales are largely represented by Kmart, Wal-Mart, JCPenney, Federated Department Stores, and Costco, which together make up about half of WestPoint's sales (Krippel, 2004d). Federated Department Stores includes Bloomingdale's, Bon-Macy's, Goldsmith's-Macy's, Lazarus-Macy's, Macy's East, Macy's West, Macy's Home Store and Rich's-Macy's. Increasing its sales to specialty stores would help with its strategy to provide products across to diverse distribution channels.

Table 8. Retail Customers of WestPoint Stevens and Springs, in Alphabetical Order.

WestPoint Stevens Retail Customers	**Spring Industries Retail Customers**
AAFES	BC Moore
Bed Bath & Beyond	Bed Bath & Beyond
Bon Marche	Belk
Boscov's	Bloomingdale's
Burdine's	Burdine's
Costco	Carson Pirie Scott
Dillard's	Famous Barr
Famous Barr	Filene's
Filene's	Foley's
Foley's	Fred Meyer
Hecht's	Hecht's
JCPenney	Linen Source
Kmart	Linens 'n Things
Kaufman's	Luxury Linens
Kohl's	Macy's
Linens 'n Things	Mervyn's
Macy's	Proffitt's
Robinson's-May's	Robinson's-May's
Mervyn's	Springs Outlet Stores
Rich's	The Bon Ton
Sam's	Wal-Mart
Sears	www.amazon.com
Target	

Table 8 (continued).

Wal-Mart	
WestPoint Stevens Stores	
www.WPSstores.com	
www.amazon.com	

Note: Highlighted cells indicate common customers. Sources: WestPoint Stevens, 2003; Springs Industries, n. d.; Federated Department Stores, Inc., 2004.

Both WestPoint Stevens and Springs sell their products to companies in specialty, discount and department store retail channels. There is no marked difference in the proportion of sales to each channel between WestPoint and Springs.

Market Strategy

Springs is not a publicly traded company, so it is able to take more risks and reinvest without focusing on an immediate return on investment for its shareholders. As CEO, Crandall Bowles said she will use the freedom of being a private company to pursue longer term strategies (Elkins, 2004). Springs is focusing on brand recognition, including increasing brand recognition for its own Wamsutta and Springmaid brands (Springs Industries). Springs also designs products specifically for stores like JCPenney and partners with designers to produce licensed lines like Kmart’s Thalia home line (E. Barragan, personal communication, April 29, 2004).

As a publicly traded company, WestPoint Stevens’ industry approach centers around return on investment for its shareholders. The company employs a brand-based strategy that focuses on delivering diverse brands through a variety of distribution channels. WestPoint owns rights to national brands (such as Martex), as well as producing products under their own private label brands for specific retailers (such as Martha Stewart Everyday for Kmart) and licensing brand names from other companies. One of WestPoint's most successful licensed brands is Ralph Lauren Home. According to the company website, WestPoint Stevens is focusing its efforts on progress with an "eight-point plan." The company wants to expand its own brands to gain a strong market position, explore licensing possibilities, keep manufacturing at a level that matches demand for its products, consolidate to reduce overhead, increase international sourcing, improve the logistics of its supply chain and make its capital structure more flexible.

Table 9. Comparison of Two Leading U.S. Home Textile Manufacturers

	Springs Industries	WestPoint Stevens
Products	Rugs, ceramic bath accessories, comforters, bedding, sheets, shower curtains, towels	Sheets, towels, curtains, blankets, comforters, bath rugs, mattress pads, pillows, feather/down/natural fill items
Major Customers	Wal-Mart, Target, JCPenney, Springs Outlet Stores	JCPenney, Kmart, Wal-Mart, Costco, Federated Department Stores
Top Brands	Beaulieu, Daisy Kingdom, Dundee, Regal, Springmaid, Wamsutta	Martex, Grand Patrician, Utica, Chatham, Vellux, Lady Pepperell
Licenses	JCPenney Home Collection, NASCAR, Coca-Cola, My Little Pony, Cat in the Hat	Ralph Lauren Home, Disney Home, Simmons Beautyrest, Glynda Turley, Martha Stewart, Joe Boxer
Number of Employees (2003)	17,000	13,886

Research Question Two: Who are the Leading Home Textile Mass Specialty Retailers?

Research Question Two utilizes compiled financial and industry data and documents to identify the leading specialty retailers in the U.S., and then to compare the companies. The mass specialty retailers were selected for evaluation *a priori* the data collection because it was expected that consumers would have the most access to home textile products at the fast-growing mass specialty retail channel. In this section, the companies are described in terms of their target customer, product offerings, pricing and general market strategy.

According to a 2001 company analysis by the University of Oregon Investment Group, Bed Bath & Beyond held 3% of the home goods market, while Linens 'n Things held 2%. However, specialty home textile stores accounted for about 20% of the home goods market in 2001 (Bed Bath & Beyond, Inc, 2001). Smaller specialty stores and boutiques make up the remaining 15% of the home goods market accounted for by specialty retailers. The other 80% of the home goods market is comprised of a variety of types of stores including department stores, discount stores, and other stores that do not specialize in home goods (Bed Bath & Beyond, Inc, 2001).

Company Development

Bed Bath & Beyond is the largest superstore retailer (by sales volume) that specializes in domestics (Krippel, 2004a). The company was founded in 1971 by Warren Eisenberg and Leonard Feinstein as a smaller store, only offering linens (Krippel, 2004a). Originally named Bed n Bath, the company adopted the superstore layout and started carrying home furnishings in 1985 and changed its name to Bed Bath & Beyond in 1987 to reflect the change in product offerings (Krippel, 2004a). Bed Bath & Beyond went public in 1992 and is currently traded on the NASDAQ National Market. Based in Union, New Jersey, Bed Bath & Beyond had 29,000 employees at the end of fiscal year in February, 2004 (Krippel, 2004a). The company currently operates 573 stores in the United States and two stores in Puerto Rico.

Based in Clifton, New Jersey, Linens 'n Things is the second largest superstore retailer of domestics in the U.S., behind Bed Bath & Beyond. Linens 'n Things was founded in 1975 by Eugene Kalkin. In 1983, the chain of stores was sold to Melville Corp. (now called CVS). Melville sold all shares of the company in 1997, and Linens 'n Things shares are now traded on the New York Stock Exchange. At the end of the 2003 fiscal year, Linens 'n Things had 17,200 employees and operated 423 stores in the U.S. and 17 stores in Canada.

Product Offerings

Bed Bath & Beyond divides its products into two main categories: domestics, which include bed linens, bathroom, and kitchen linens and home furnishings, which is comprised of, among other products, cookware, cutlery, appliances and picture frames (Krippel, 2004a). Linens 'n Things divides its products into six departments throughout the store: bath, home accessories, housewares, storage and cleaning, bedding and window treatments (Krippel, 2003b). One reason for the difference in product categorization may be that Bed Bath & Beyond gives its store managers flexibility in their product offerings depending on which products sell well in each store (Bed Bath & Beyond, 2001). It uses this approach to cater to local tastes and approach the customer like a neighborhood store (Byrnes, 2004). While offering products based on sales performance may help company profits, one drawback of this strategy is that store inventories may be inconsistent between stores, causing problems for consumers interested in using gift registries, which are available through both Bed Bath & Beyond and Linens 'n Things.

Market Strategy

Bed Bath & Beyond focuses on a 'better quality than department stores, with reasonable prices' strategy without spending on national licenses and brands (Bed Bath & Beyond, 2001). Bed Bath & Beyond focuses on variety and price, but offers nationally known name brands such as Nautica, Nicole Miller and Liz Claiborne, which are featured in bed and bath categories. The company holds no debt, and grows mostly by new store openings. Bed Bath & Beyond saves money by forgoing distribution centers and having inventory delivered directly to the stores from the suppliers (Bed Bath & Beyond, 2001).

Linens 'n Things sells licenses in all six of its departments to help support its strategy of offering a wide selection of name brands at low prices (Linens 'n Things, 2003a). Linens 'n Things sells a wide variety of brands, including Nautica, Waverly and Laura Ashley as well as private label LNT that accounted for 10% of the store's sales in 2002. Linens 'n Things grows through new store openings, while maintaining profit by closing under-performing stores. In contrast to Bed Bath & Beyond, Linens 'n Things maintains a centralized infrastructure with three distribution centers in the eastern U.S. in North Carolina, New Jersey and Kentucky.

Bed Bath & Beyond and Linens 'n Things carry similar product mixes and target the same customers. They seem to share the same strategy, but approach it in different ways. Bed Bath & Beyond is focused on quality and variety; it strives to carry better quality than department stores at prices lower than those of department stores, while Linens 'n Things has a more brand-focused approach, carrying the same brands as department stores at lower prices. Visual observation of the stores revealed more similarities than differences. Both stores feature a "big box" layout (large, often stand-alone stores with an exhaustive inventory), with a nearly identical floor layout, described by one analysis as a race track layout designed to draw customers through the entire store (Bed Bath & Beyond, Inc, 2001). The visual similarities within stores may increase difficulty in differentiation between the two stores.

Research Objective Two:

To Ascertain the Level of Importance that Traditional Buyer Decision Factors Such as Price, Color and Style have within the Hispanic Consumer Market for Home Textile Products

Research Objective Two used the survey method and the questionnaire instrument to gather data for Research Questions Three through Twelve which investigated the importance of price, color, style, brand name, fiber content, packaging, fabric type, thread count, coordination and retail channel for bed and bath products. Questionnaire results also provided data for Research Question Thirteen, which evaluates the product availability of bed and bath products consistent with the preferences of the respondents, and Research Question Fourteen, which investigates if the level of importance for bedding and bath criteria differ based on the consumer's cultural influence.

For this part of the research, 30 female Hispanic respondents completed a questionnaire evaluating the importance of price, color, style, brand name, fiber content, packaging, fabric type, thread count and retail channel on their purchases of bed and bath textiles. Twenty percent (n=6) of the responses were collected using the paper questionnaire and 80% (n=24) were collected using the online version. The online version of the questionnaire was located at the temporary website www.hometextileresearch.org. The response rate for the multiple choice questions on the questionnaire was 100% (*N*=30). The response rate for the open-ended questions is discussed later this chapter.

As described in Chapter III, there were three types of questions on the questionnaire. Nominal questions (Questions 1, 3, 8d, 8e, and 8f) asked the respondent to choose the item that best described their preferences toward bed and bath products and retail channels. Questions 2a-c, 4a-b, 5, 6a–h, 7a–f and 8a–c were multichotomous in that they gave the respondent a limited number of responses, but the responses were presented in an ordinal Likert scale format with 1 being identified on the questionnaire as NOT IMPORTANT (or LESS OFTEN) and 5 being VERY IMPORTANT (or MORE OFTEN). For the purposes of interpretation, the intermediate values of 2, 3 and 4 have been assigned the relative values of LESS IMPORTANT, NEUTRAL and MORE IMPORTANT. Questions 9a–c and Question 10 were open-ended questions.

The ordinal questions on the questionnaire had a consistent scale from 1 to 5, but had three different response titles. Questions 4a, 4b, 5, 6a-h, 7a-f and 8c had an ordinal scale of five options with 1 being designated as NOT IMPORTANT and 5 being designated as VERY IMPORTANT. For the purposes of interpretation, the intermediate values of 2, 3 and 4 have been assigned the relative values of LESS IMPORTANT, NEUTRAL and MORE IMPORTANT. The odd number of options in the ordinal scale for each of the questions allows for 3 to represent no strong preferences, or a neutral level of importance.

Demographics

Figure 8 illustrates the ages of the respondents; most respondents (94%, n=28) were 24 years old or younger, which was consistent with the ad hoc expectation because the target sample consisted of college students.

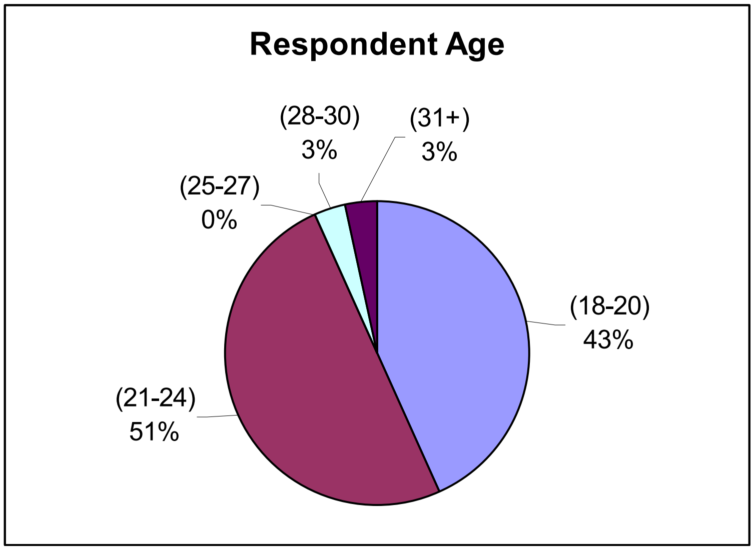

Figure 8. Question 8d: Respondent Age

The U.S. Census Bureau reports that Hispanics may be of any race (U.S. Census Bureau, 2003), so the term Hispanic was used to describe ethnicity. Nearly all (96.7%, *n*=29) of the respondents indicated an ethnicity of "Hispanic." One subject identified herself as Other.

Question 8f addressed respondent income. There were four options: less than \$20,000; \$20,001 - \$40,000; \$40,001 - \$60,000; and more than \$60,001. The mode response was less than \$20,000, which was anticipated because the target sample consisted of college students. Figure 9 shows the details of the responses.

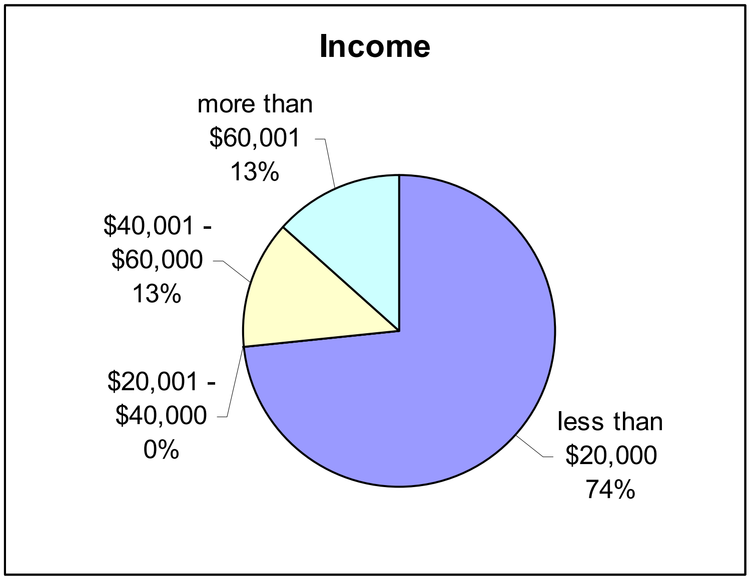

Figure 9. Question 8f: Respondent Income

Frequency of Purchase

Questions 8a and 8b inquired about the number of times per year the respondent purchased bedding (8a) and bath (8b) products. The questions had an ordinal scale of five options: “less than 1 [time per year],” “2 [times per year],” “3 [times per year],” “4 [times per year],” and “more than 5 [times per year].” In retrospect, the scale would have been more inclusive if it had included options for “1 [time per year]” and “5 [times per year].”

The modes for both 8a and 8b were “less than 1” time per year. Figure 10 shows a histogram with the frequencies of responses for 8a and 8b. The responses for bath purchases were more widely distributed than for bedding. No respondents indicated that they shopped for bedding products more than 3 times per year, but 20% of respondents (n=6) indicated that they shopped for bath products 4 times per year, but not more than 5.

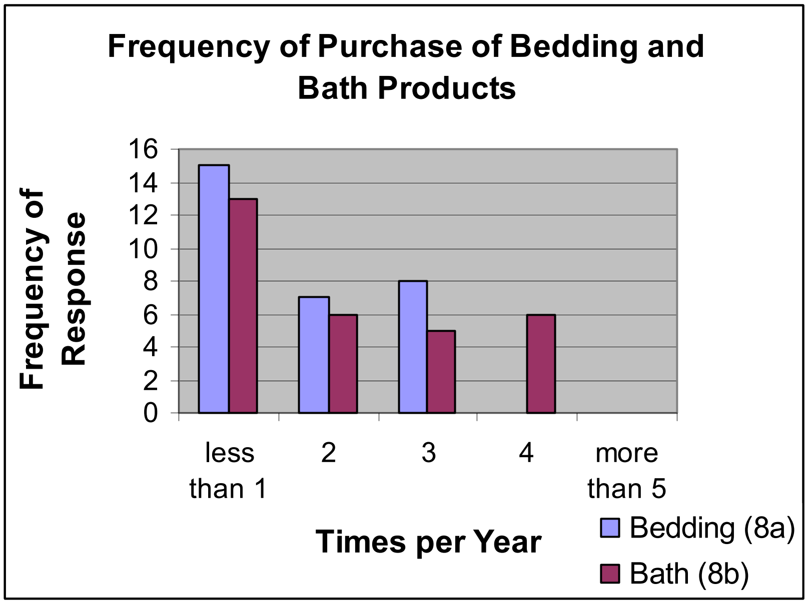

Figure 10. Frequency of Responses for Questions 8a and 8b: Frequency of Purchase of Bedding and Bath Products.

Fashion Orientation

The final demographic question of the questionnaire, Question 8c, has ordinal answers on a scale of 1 to 5, with 1 representing an opinion of NOT IMPORTANT and 5 representing an opinion of VERY IMPORTANT. Question 8c determines the respondents' level of fashion interest with regard to home textiles. Overall, the respondents found keeping up with the latest home fashion trends to be LESS IMPORTANT (M=2.23). More than one-third of the respondents reported 3 as their importance rating, indicating a neutral opinion. No respondents indicated that they think keeping up with the latest home fashion trend is VERY IMPORTANT (5). The frequency of responses for Question 8c is shown in Figure 11.

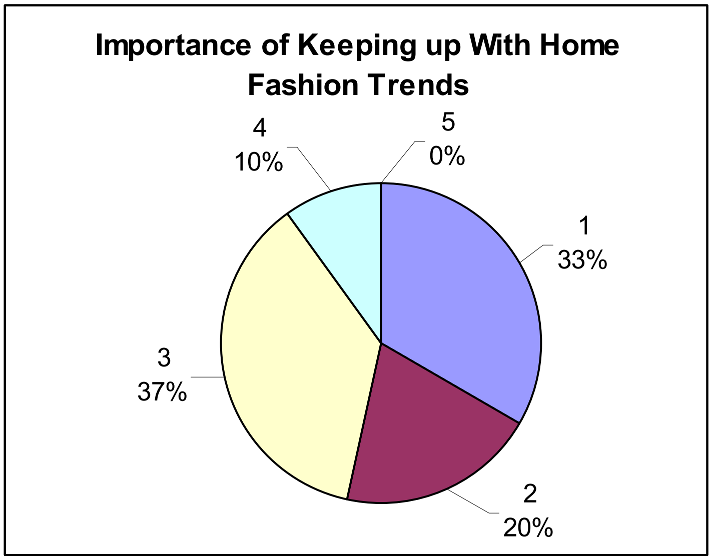

Figure 11. Question 8c: The Importance of Keeping Up with the Latest Home Fashion Trend

A two-tailed t-test was conducted to see if the mean importance rating for keeping up with the latest home fashion was significantly different from 3. The results of the test ($p<.01$) indicate that, with an average response of 2.23, the mean importance level is significantly below 3. This indicates that, on average, the respondents considered keeping up with home fashion trends as LESS IMPORTANT.

The Importance of Decision Criteria for Bed and Bath

Decision criteria for bedding were investigated in Questions 6a-h. The questions used a scale of 1 to 5 (1= NOT IMPORTANT, 2= LESS IMPORTANT, 3= NEUTRAL, 4=IMPORTANT, 5= VERY IMPORTANT). Question 6a-h addressed price, color, style, brand name/designer, fiber content, fabric type, thread count and availability of packaged sets for bedding.

Question 7a-f investigated decision criteria for bath and had six variables: price, color, style, brand name/designer, fiber content and availability of packaged sets. Question 7 mirrors the format of questionnaire item 6, but omits *a priori* fabric type and thread count because those are not pertinent criteria to bath products. Figure 12 shows the relationship between the mean importance rating of bedding and bath products.

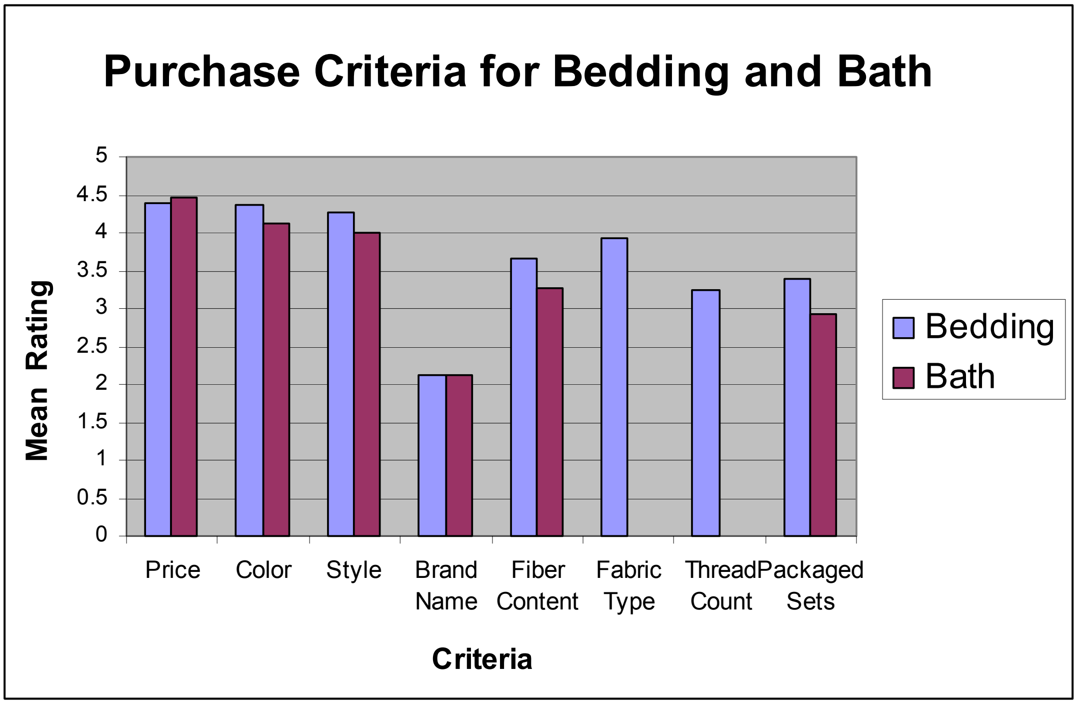

Figure 12. Purchase Criteria for Bedding and Bath.

Tables 10 and 11 show the descriptive statistics for the respective purchase criteria. Each research question is later discussed in more detail.

Table 10. Descriptive Statistics for the Results of Bedding Decision Factor Importance (Questions 6a-h).

Question	Topic	Research Question	n	Mean	Mode	Std Dev	Variance
6a	Price	3	30	4.40	5	0.67	0.66
6b	Color	4	30	4.37	5	0.67	0.45
6c	Style	5	30	4.27	5	0.81	0.55
6d	Brand Name	6	30	2.13	1	1.02	1.22
6e	Fiber Content	7	30	3.67	4	1.29	1.40
6f	Fabric Type	9	30	3.93	4	0.95	0.89
6g	Thread Count	10	30	3.23	5	1.45	1.84
6h	Packaged Sets	8	30	3.40	4	0.96	1.01

Table 11. Descriptive Statistics for the Results of Bath Product Decision Factor Importance (Questions 7a-f).

Question	Topic	Research Question	n	Mean	Mode	Std Dev	Variance
7a	Price	3	30	4.67	5	0.91	0.74
7b	Color	4	30	4.13	5	0.96	0.74
7c	Style	5	30	4.00	5	1.20	1.10
7d	Brand Name	6	30	2.13	1	1.09	1.29
7e	Fiber Content	7	30	3.27	3	1.13	1.03
7f	Fabric Type	9	30	2.93	2	1.18	1.51

Research Question Three: How Important is Price when Deciding upon Home Textile Products (Bedding and Bath)?

Responses to the questions determining the importance of price when purchasing bedding and bath items, Question 6a and 7a, had the highest average importance rating of all the purchase criteria. The mean for bedding (M=4.37) was slightly lower than the mean for bath (M=4.47), though the mode for both was 5. No respondents rated bedding price as 1 (NOT IMPORTANT). Question 7a focused on the importance of price for purchasing bath products. Most (93%, *n*=28) respondents gave a response of 4 or 5 for the importance of price for bath products. A t-test indicated that for both bedding (p<.000) and bath (p<.000), the mean response indicated a higher than NEUTRAL importance.

Research Question Four: How Important is Color when Deciding upon Home Textile Products (Bedding and Bath)?

Question 6b, which evaluated the importance of color when purchasing bed products, had the second highest average rating of the bed criteria (M=4.37), and a mode of 5. No respondents reported an importance rating of 1 or 2 for bedding product color. Question 7b evaluated the respondents' value of color when purchasing bath products (M=4.13). The mode was 5 for this question item. The mean responses for bed (p=.002) and bath (p<.000) were significantly greater than NEUTRAL.

Research Question Five: How Important is Style when Deciding upon Home Textile Products (Bedding and Bath)?

Question 6c evaluated the level of importance placed on the style of bedding products (M=4.27). Question 6c had a mode of 5. No respondents indicated that style had a low importance level of 1 or 2 for bedding products. The answers for Question 7c reveal the level of importance placed on the style of bath products by the respondents (M=4.0). The mode was 5. A t-test indicated that responses for both 6c and 7c were significantly greater than NEUTRAL (p<.000 for both responses).

Research Question Six: How Important is Brand Name when Deciding upon Home Textiles Products (Bedding and Bath)?

The importance of brand name/designer was evaluated in Question 6d. Brand name/designer had the lowest mean score of the bedding criteria (M=2.13), with a mode of 1. No respondents identified brand name/designer as VERY IMPORTANT (5). Question 7d was concerned with the importance of the brand name/designer in the purchase of bath products. Parallel to 6d, 7d had the lowest mean score of the bath criteria (M=2.13). Nearly half of the respondents (43.3%, *n*=13) selected NOT IMPORTANT (1). None of the respondents indicated that the brand name/designer of bath products was VERY IMPORTANT (5) when purchasing the bath products. The mean responses to 6d and 7d were significantly lower than NEUTRAL ($p<.000$ for both responses).

Research Question Seven: How Important is Fiber Content when Deciding upon Home Textile Products (Bedding and Bath)?

In Question 6e, examples of fiber content were included ("ex: 100% cotton or 60% cotton, 40% polyester") to ensure clarity of the question. Although the mean importance was only slightly higher than 3 (M=3.67), the t-test revealed a significant difference from 3 ($p<.01$). The mode for the importance of fiber content for bedding was 4. The importance of fiber content in bath product purchasing decisions was explored in Question 7e. The mode was 3 (M=3.27). The average importance rating was not significantly different from 3 ($p=.16$), which indicates that the respondents were NEUTRAL in their rating of fiber content for bath products.

Research Question Eight: How Important is the Availability of Packaged Product Sets when Deciding upon Bedding Products?

To determine how the respondents prefer to purchase bedding products, Question 3 of the questionnaire had three options, each followed by a brief explanation. The options were: "Individual Items," "Packaged Set" and "Bed-in-a-bag." Results of the responses are shown in Figure 13.

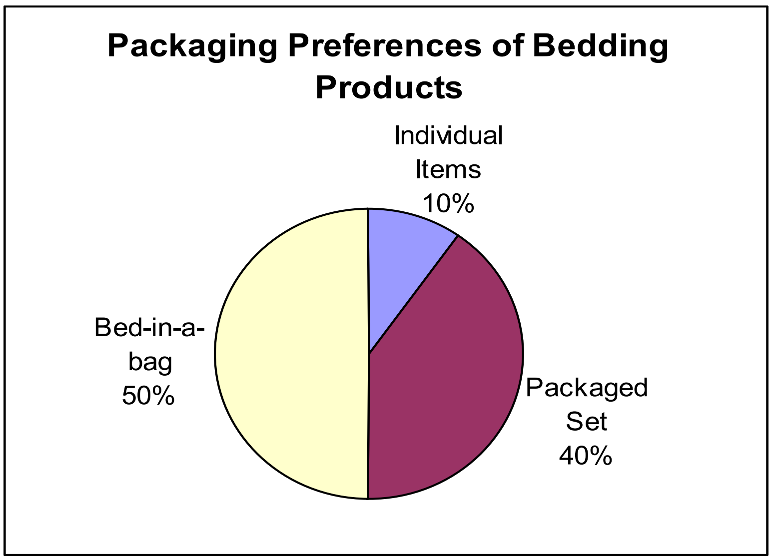

Figure 13. Question 3: Packaging Preferences of Bedding Products.

The most frequent response to Question 3 was "Bed-in-a-bag," which accounted for 50% (n=15) of the responses. There is an apparent preference for packaged sets (both "packaged" as defined in the questionnaire instrument as a flat sheet, fitted sheet and pillow case together as well as the bed-in-a-bag packaging approach) over individually sold bedding items. In support of the responses to Question 3 (packaging preferences), results of a one-sample t-test indicated that respondents' average importance rating for Question 6h was significantly above 3. This may provide a connection for future study of the level of preference for each type of bedding packaging.

Research Question Nine: How Important is Fabric Type when Deciding upon Bedding Products?

The importance of fabric type was evaluated in Question 6f, and examples of woven, satin, sateen and t-shirt were given for clarification. The mean response was a value of 3.9, and the question had a mode of 4. No questionnaire respondents indicated that fabric type was NOT IMPORTANT (1). A t-test indicated that the mean response was significantly higher than NEUTRAL ($p<.000$).

Research Question Ten: How Important is Thread Count when Deciding upon Bedding Products?

Question 6g asked respondents about the importance of thread count when purchasing bedding. The average response was 3.23 and the mode was 4. An importance rating of greater than 3 appears to indicate some level of interest in thread count, which has been a recent trend in the quality differentiation of sheets. However, the mean response was not significantly different than NEUTRAL ($p=.354$), indicating thread count may have a lower relative importance to other purchase criteria.

Research Question Eleven: How Important is Coordination of Bedding? How Important is Coordination of Bath Products? How Important is Coordination Between Bedding and Bath?

On a scale of NOT IMPORTANT (1) to VERY IMPORTANT (5), survey respondents indicated their feelings about coordination of bedding products (4a), bath products (4b), and coordination between bed and bath products (5). The availability of coordinated items for bedding products was generally indicated to be important (M=4.27) with a mode of 5, and no respondents indicating it was NOT IMPORTANT (1). The percentages are presented in Figure 14. A t-test for significance indicated that the average importance rating for Questions was significantly different than 3 (p<.01).

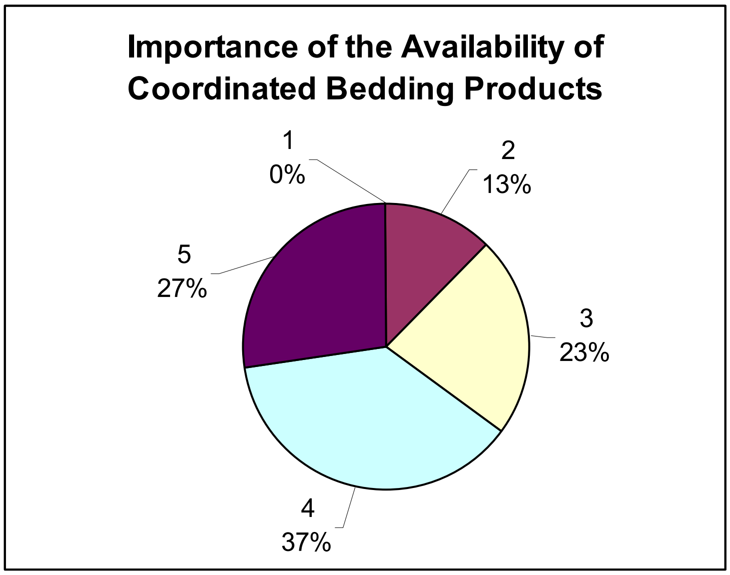

Figure 14. Question 4a: The Importance of the Availability of Coordinated Bedding Products.

The availability of coordinated items for bath products had a mode of 5 and a mean importance rating of 3.83, which is lower than that of bath. A t-test indicated that the importance rating is higher than 3 (p=.022).

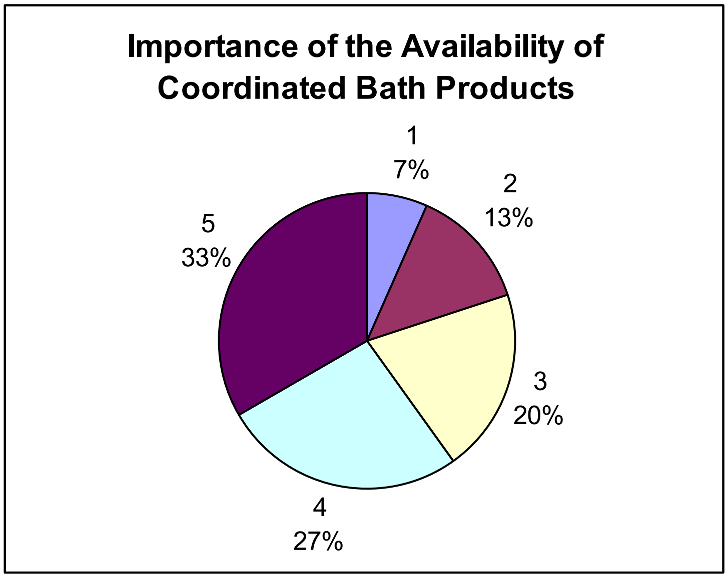

Figure 15. Question 4b: The Importance of the Availability of Coordinated Bath Products.

Question 5 of the questionnaire asked respondents to rate the importance of the availability of coordination between bed and bath products. This question deals with the continuance of a theme, motif or color scheme through multiple rooms of the house rather than the coordination of products within one room. The mean response suggested that coordination between bed and bath is LESS IMPORTANT (M=2.43). The breakdown of responses is illustrated in Figure 16. A t-test for significance indicated that the average importance rating for Question 4b was significantly different than 3 (p<.01).

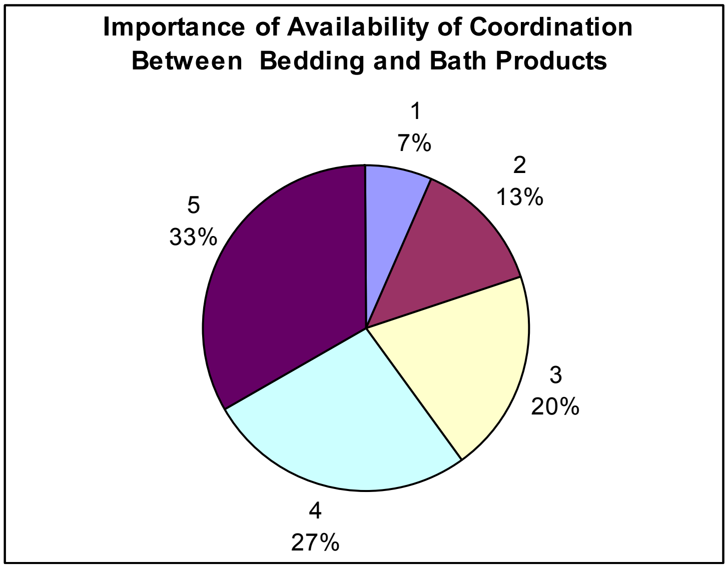

Figure 16. Question 5: The Importance of the Availability of Coordination Between Bedding and Bath Products.

A summary of the descriptive statistics of all three coordination questions is provided in Table 12. It is apparent from Table 12 that coordination of bedding is the most important, while coordination between both bath and bedding is less important.

Table 12: Descriptive Statistics for Coordinated Products

Question	Coordination of:	n	Mean	Mode	Std Dev	Variance
4a	Bedding	30	4.27	5	0.87	0.75
4b	Bath	30	3.83	5	1.32	1.73
5	Between Both Bath and Bedding	30	2.43	3	1.28	1.63

Means for both 4a and 4b are higher than 3, indicating that coordination is IMPORTANT (M=4.27, M=3.83). However, the mean for coordination between both bedding and bath was below 3 (M=2.43), suggesting less importance. This may be an important consideration for lines such as Thalia's bed and bath styles, which offer the product lines with bedding and coordinating bath products.

Research Question Twelve: What is the Preferred Retail Channel for Purchasing Home Textile Products? What is the Most Frequently Used Retail Channel?

The results of Question 1 are illustrated in Figure 17. Question 1 asked "At which type of store do you shop most frequently for bedding and bath products?" There were three nominal answers, each followed by an example to illustrate the types of store included in that retail channel; discount store, department store and specialty store. Of the 30 responses, the most frequent response, or mode, was discount store, with 60% (*n*=18) of the responses.

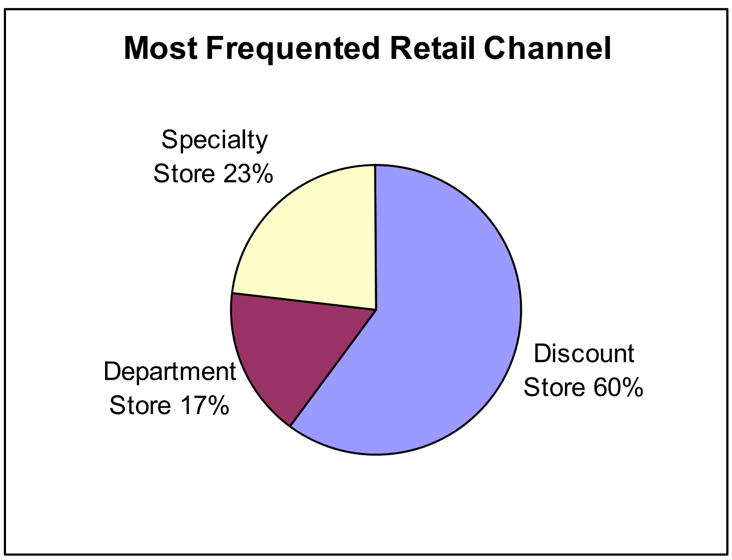

Figure 17. Question 1: Most Frequented Retail Channel

Question 2 investigated the level of preference for shopping at stores of different distribution channels. Questions 2a, 2b and 2c had an ordinal scale of five options on a scale of 1 to 5, with 1 being designated LEAST PREFER and 5 being designated MOST PREFER. This question is different from Question 1, which asked which channel the respondent shopped most frequently in that it asks how much they prefer shopping at stores of each channel. Question 2a referred to the level of preference for shopping at discount stores, 2b referred to the level of preference for shopping at department stores and 2c referred to the level of preference for shopping at specialty stores. Table 13 gives the descriptive statistics for Question 2 parts a-c.

Table 13: Descriptive Statistics for Retail Channels

Channel	**n**	**Mean**	**Mode**	**Std Dev**	**Variance**	**P =**
Discount	30	3.70	4	1.32	1.73	.007
Department	30	3.33	4	1.12	1.26	.115
Specialty	30	3.40	5	1.52	2.32	.161

The descriptive statistics show that the respondents' mean preference was highest for the discount channel. Results of t-tests revealed significance only for discount stores. However, specialty stores received the highest mode rating. The variance is highest for the specialty channel.

Research Question Thirteen: Does the Retail Market make Available Home Textile Products that Satisfy the Preferences of Specialty Markets?

The availability of home textile products that satisfy the preferences of Hispanic consumers based on the collected survey responses is evaluated in Research Question Thirteen. One Linens 'n Things store and one Bed Bath & Beyond store were visited in each of the following North Carolina piedmont cities: Raleigh, Greensboro and Charlotte. The results of the visual observation of available products were recorded on the data capture sheets shown in Appendix C and Appendix D. Generally, bath products that satisfied the preferences of the survey respondents were more widely available than bedding products.

Bedding

The data capture sheet in Appendix C was created from the responses to survey Question 9a, which was open-ended. Based on color categories and pattern descriptions from 9a, bright dark and pastel colors and solid colors, simple patterns and contrasting (light against dark) patterns were sought. The two items evaluated in the bedding component of store observation were packaged sets (identified in the questionnaire as a flat sheet, fitted sheet and pillowcase sold together) and bed-in-a-bag items (identified in the questionnaire as sheets, pillowcase, comforter and bed skirt). In packaged sets, most preferences were available with the exception of orange colored sheets and sheets with patterns of light against dark contrast.

Bed-in-a-bag sets were not available with many of the expressed preferences of the survey respondents. “Bright” colors were not readily available. All of the six stores evaluated had bed-in-a-bag products available in bright colors, but in three stores, the colors were not available in “simple” patterns or were only available in “floral” patterns. In addition to many floral patterns, there were also sets that had small repeating patterns, another expressed dislike (respondents described a preference for “simple” patterns). Respondents of the survey indicated a preference for simple patterns and a dislike for floral patterns in their bedding products. Additionally, other characteristics that were lacking from all stores’ bed-in-a-bag selections were the availability of t-shirt sheets in the bed-in-a-bag sets, the availability of 100% cotton sheets (present in the stores, but only in a few of the product selections), high thread count sheets (300-400), and solid patterns. Solid colors were available in comforters sold individually, but not as a bed-in-a-bag set.

Bath

Bath products matching the preferences of survey respondents were more widely available than the bedding products. As in the evaluation of bedding products, bright, dark and pastel color categories were sought in addition to explicitly mentioned colors (from Question 9b). Orange was the most difficult color to locate, but other "bright" colors were available. Price was indicated as the most important purchase criteria in bath products, but towels were generally the only product with store signage indicating low prices. Bed Bath & Beyond stores had signs in various locations in their stores (in some cases, in the towel area) that advertised "Great Savings Everyday." Shower curtains with the desired characteristics (with the exception of low pricing tags, signs or apparent marketing) were available in all stores. Rugs were available in bright colors, but had a limited pattern selection.

Research Question Fourteen: Does the Level of Importance for Bedding and Bath Criteria Differ Based on the Consumer's Cultural Influence?

Research Objective Two focuses on the Hispanic consumer market for home textiles. Questions 9a, 9b and 9c were open-ended questions located at the end of the questionnaire, and were designed to determine if there were other important decision factors based on the Hispanic heritage of the respondents. In contrast to the quantitative questions, which had a 100% response rate, the qualitative open-ended questions had varying response rates. Questions 9a and 9b were present on both the paper version and online version of the questionnaire, and all respondents had an opportunity to participate in those questions. There was an 80% response rate. However, only the respondents who took the online questionnaire had the opportunity to answer Question 9c. There were three nonresponses of the 24 respondents who took the online version of the questionnaire for a response rate of 87.5%. One verbal response was obtained from a respondent who took the paper version of the questionnaire. The nonresponse rate for 9c mirrored that of the other open-ended questions.

Responses for Questions 9a and 9b were evaluated individually and divided into coding groups that were identified by common themes in the responses. Further coding was conducted to identify consistencies between responses. For the open-ended responses to Questions 9a and 9b, there were five categories of coded responses: color, fabric, style, patterns and other.

Bedding.

Question 9a asked prompted survey respondents to describe their preferences in bedding with the prompt “Please describe your preferences in bedding (Ex: color, fabric, pattern, style).” Of the 24 responses to question 9a, there were 17 responses that described color preferences in some way. “Bright” was included by three respondents, “dark” was included by four respondents, and three respondents described pastel colors (using the terms “pastel,” “spring,” and “tropical,” which were interpreted as belonging to the same color group). Other color descriptions that seemed consistent with the previously mentioned colors, but were mentioned only one time each were “deep,” “warm,” “strong,” “bold” and “contrasting”. Four respondents named specific colors or color groupings (red; orange and yellow; blue and tan; purple, black and white) . The color descriptions (that were common to Question 9a and 9b) and frequency at which they were identified are displayed in Figure 18.

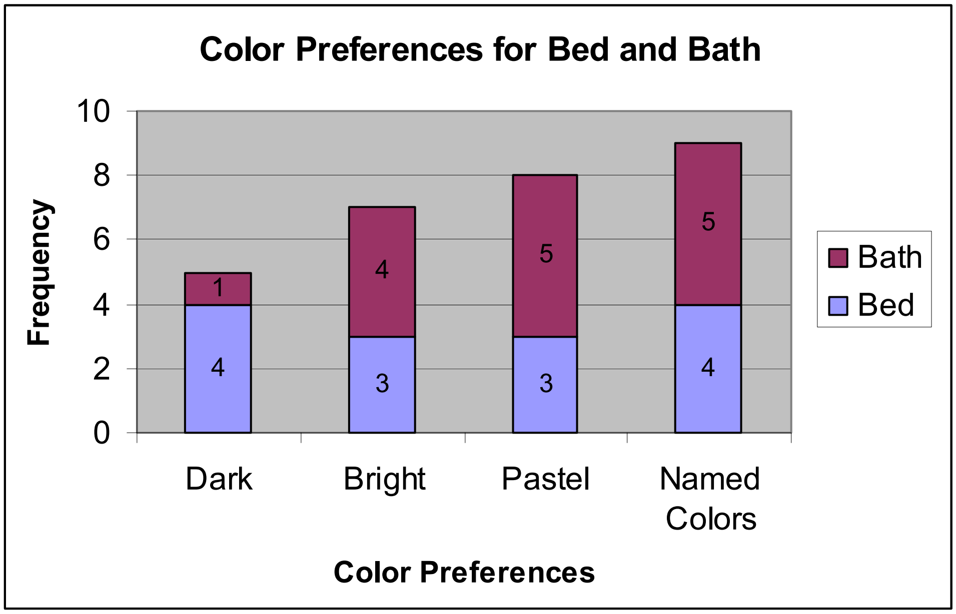

Figure 18. Questions 9a and 9b: Frequency of Color Preferences for Bed and Bath.

Seven respondents included descriptions of their fabric preferences. Four responses indicated that they preferred high thread count, and four responses indicated a preference for cotton fabrics. Three responses were gathered that pertained to bedding styles. Two respondents specified that they prefer "simple" styles for their bedding, and a third described her style preference as "antique."

Twelve of the responses included information about pattern preferences. Of these 12, several specified more than one type of preference. There were six comments that indicated the respondents did not like patterns on their bedding. Four responses specifically stated that floral patterns were undesirable. Another four identified a preference for solid-colored bedding. Two responses said that "simple" patterns were preferred.

Twelve responses that did not fit into one of the four categories described above were received for Question 9a. Eight respondents said that softness or comfort was important, while two respondents specified that bedding should be washable.

Bath Products.

Question 9b prompted the respondent for their bath preferences. The question read "Please describe your preferences in bath products (Ex: color, fabric, pattern, style etc)." Sixteen of the responses referred to color preferences. Four respondents indicated that they liked "bright" colors in the bathroom, five described pastel colors (using the terms "pastel," "light" and "tropical"), and five respondents named their bathroom decorating colors. Only one respondent indicated that she prefers "dark" colors in the bathroom, compared to four respondents who indicated a preference for "dark" colors in the bedroom.

Two respondents expressed a preference toward 100% cotton bath products, compared with four references to cotton content for bedding. Four respondents described their taste in style as "simple," and two specified that matching was important. The respondents (respondents number 4 and number 6) who indicated in Question 9a that matching was important were the same respondents who specified consistent themes or matching in Question 9b. In the quantitative section of the questionnaire, respondent 4 rated the importance of availability of coordinated items as VERY IMPORTANT for bedding (4a), bath products (4b) and between bed and bath products (5). Respondent 6 gave an importance rating of 4 for the availability of coordinated bedding (4a) and bath products (4b), but only rated the importance of coordination between bedding and bath as 3, or approximately NEUTRAL.

In describing their preferences for bath products, nine respondents gave information about their preferred patterns. Three respondents indicated that they preferred bathroom products without patterns: one respondent explicitly stated that they preferred not to have patterns, and another two said they like solid colors in the bathroom. An additional five respondents described "simple" patterns in their preferences.

Eleven respondents gave answers in the 'other' coding category. Four responses described softness and comfort as important, and two separate answers described the importance of functionality (water resistance of shower curtains and "bleachability" of towels). Price was mentioned in two responses to 9b, and was not mentioned at all in the responses to 9a. This suggests that price may be a more important factor in choosing bath products than for bedding. Two unexpected responses indicated that the scent of bath products was important. This could present an opportunity for co-branding between a bath line and laundry detergent.

Influence of Hispanic Heritage.

Question 9c asks how the respondents feel their cultural heritage influences their colors or style preferences. Twenty two of the completed questionnaires included responses to Question 9c. Of the 22, 12 stated that they feel their cultural heritage does influence their home textile preferences. Of those 12, five stated that their preferences for bright colors were due to their heritage. An additional four respondents indicated that their Hispanic heritage affects other color or style preferences, but not their preferences for bed and bath. Six respondents stated that they feel their Hispanic heritage had little or no influence on the color or style preferences they have for home textiles.

Because ethnicity was the most important defining factor for this specific consumer group, an ANOVA test was conducted post hoc to find out if segmenting the respondents by whether they thought their culture influenced their preferences would explain differences in their rating of the importance of the following variables: color (for bedding and bath), style (for bedding and bath), brand name (for bedding and bath), fiber content (for bedding and bath), the availability of packaged product sets (for bedding and bath), fabric type (for bedding) and thread count (for bedding). Question 9c asked respondents how they felt their cultural heritage influenced their preferences for color and style in home textiles. This question was chosen as the independent variable because the responses may present a gauge of how strongly the respondents represent the Hispanic home textile market.

Question 9c is an open-ended question; therefore, it was necessary to convert the responses into a nominal scale before a statistical test could be run. Nonresponses to Question 9c were coded as 0; responses indicating that the respondents did not feel that their cultural heritage affected their home textile preferences were coded as 1; responses indicating that cultural heritage did affect home textile preferences in some way were coded as 2. The resulting variable is called 9c1 to differentiate it from the more specific responses to Question 9c. The frequency of each response is shown in Table 14.

Table 14. Frequency of Responses for Affect of Cultural Heritage (9c1).

Response	Code	Frequency
Non Response	0	8
Does Not Affect	1	10
Does Affect	2	12

SPSS 11.0 was used to run a one-way ANOVA test with an alpha level of .05. The responses for 9c1 were used as the independent variable, and the responses to Questions 6a-h and 7a-f were the dependent variables. Appendix E shows the descriptive statistics, ANOVA and multiple comparisons outputs from SPSS.

As shown in the significance column of Table E3 of Appendix E, Question 6c (bedding style) was the only dependent variable with a resulting significance of less than .05 (p=.036). Table 15 shows the significant information.

Table 15. Analysis of Variance for Questions 6c (Bedding Style) and 9c1 (Cultural Heritage).

Source	df	F	η	p
	Between subjects			
6c	2	3.786	1.738	0.036
	Within subjects			
6c	27	3.786	0.459	0.036

As shown in Table E1 of Appendix E, the highest mean (M=4.62) was for the nonresponse group (0), which had the lowest standard deviation (SD=.518). Group 1, which indicated that they did not feel that their cultural heritage influenced their home textile preferences had the lowest mean (M=3.80) and the highest standard deviation (SD=.789). Group 2, which indicated that they felt their cultural heritage influenced their home textile preferences in some way had a mean nearly as high as Group 0 (M=4.42) and had a standard deviation of (SD=.669). Further analysis of the least squares differences (Appendix E Table E5) showed that Group 0 was different from Group 1 and that Group 1 was different than Group2. Groups 0 and 2 were not different from one another. This may indicate that the respondents who did not give an answer for Question 9c were likely to be influenced by their cultural heritage when choosing home textile products and the importance placed on bedding style.

Additional post hoc analysis was conducted using variable 9c1 and the subjects' interest in fashion (8c). An ANOVA test was run to determine if the responses for keeping up with home fashion trends differ based on the respondents' perceived cultural influence. The results of the test yielded $F=2.247$ with $p=.125$, thus, indicating that the fashion interest level was not influenced by the respondent's perceived cultural influence.

Those respondents who said that their cultural heritage had no influence on their home textile preferences, on average, gave a lower importance rating to the style of bedding. Further study should be done with larger groups to clarify this hypothesis.

Findings

Research Objective One

Research Question One

The two leading U.S. home textile manufacturing companies were found to be WestPoint Stevens and Springs Industries. Privately held Springs is larger than publicly traded WestPoint Stevens in terms of sales volume. Research indicates that WestPoint Stevens focuses more on sheets and towels while Springs offers additional products including ceramic bath accessories which have a lower profit margin, but are often necessary to complete a product line. The two companies have similar customer bases, both making most of their sales to retailers, with only small proportions going to hospitality or institutional supply companies. Table 8 highlights these similarities.

Research Question Two

Bed Bath & Beyond and Linens ‘n Things were found to be the two leading home textile mass specialty retailers. The two companies have nearly identical product offerings, share similar business strategies and seem to cater to the same customer base. Both companies are publicly traded, though Bed Bath & Beyond, which is larger in terms of total sales and number of stores, operates without debt (in contrast to Linens ‘n Things which uses leverage in its accounting practices), and gives its individual stores more control over the merchandise mix available in each store. The companies place stores in similar areas, frequently within the same shopping centers, offer similar products at similar price points, and accept each other’s coupons. There seems to be very little differentiation between Bed Bath & Beyond and Linens ‘n Things.

Research Objective Two

Bedding

Price, color and style were, in order, the three most important factors in the purchase decision process for bedding products. Brand name was the least important factor in the purchase decision process for bedding and bath products. Brand name was significantly below neutral and was rated LESS IMPORTANT. Fiber content was rated as slightly, but significantly above neutral importance when purchasing bedding products. The availability of packaged sets for bedding was rated as slightly but statistically above neutral importance when making purchase decisions for bedding products. Fabric type was rated as MORE IMPORTANT when purchasing bed products. Thread count was significantly a small amount above NEUTRAL when purchasing bedding.

It is not surprising that price, color and style were the most important purchase criteria for bedding because those criteria have been identified as some of the most important purchase criteria for apparel in many documented studies. Many existing studies suggest that, in general, Hispanic markets tend to be more brand-loyal than other markets, though this research supports the studies that contradict that finding. The importance of price may have been skewed in this study due to the fact that the subjects were college students, who may have less disposable income than the general Hispanic population, and due to the fact that there was an expressed preference for discount stores.

Bath

Price, color and style were the three most important factors when purchasing bath products. This result mirrors the result for bedding factors. Also parallel to bedding, brand name was the least important factor when purchasing bath products. It was significantly below neutral and rated LESS IMPORTANT. For the purchase of bath products, fiber content was not rated significantly different than NEUTRAL. The mean importance for the availability of packaged sets of bath products was rated slightly below NEUTRAL, but was not statistically different than NEUTRAL.

Like those of bedding, the purchase criteria for bath were expected to mirror the purchase criteria of apparel. In general, the average importance of bath product purchase criteria was less than that of bedding, indicating that the Hispanic consumers in my study were not as involved with their bath product purchases as they were with their bedding purchases.

Because the survey was administered online (or in the case of six questionnaires, distributed by the organization's President), there was the potential for bias due to misinterpretation of the questionnaire. One respondent answers comparable to the rest of the respondents on all questions except 7a-f. For those answers, the respondent indicated an importance rating of 1 for all criteria. This may have not have meant that the criteria were all unimportant, but that she did not have an interest in bath products and was not very involved in the purchases.

Coordination

Coordination of bedding products was MORE IMPORTANT. Coordination of bath products was only slightly, but significantly, higher than NEUTRAL. Coordination between bedding and bath products was LESS IMPORTANT. These findings support the finding that the bed-in-a-bag is the preferred packaging method for purchasing bedding. However, a lack of interest in coordination between bedding and bath products may be an important consideration for lines such as Thalia, which offers the product lines with bedding that coordinates with bath products.

Retail Channels, Shopping Frequency and Orientation

Discount stores seem to be the preferred retail channel for purchasing home textile products, but specialty and discount channels received only slightly lower levels of preference. Discount stores are the most frequently used retail channel for purchasing home textile products. There was not a large difference in the level of preference between specialty, department and discount channels, indicating that shopping frequency at a given channel may be due to convenience and location rather than preference. Location can be especially important to college students who may have limited access to transportation.

Cultural Influence

Many of the products that satisfy the preferences of the Hispanic home textile market are available at specialty mass retailers. Products featuring simple patterns and bright colors were the most clearly absent. Bed-in-a-bag products, which are the preferred bed packaging, do not offer enough high thread count sheets, cotton sheets, or solid patterns. Those respondents who indicated that they did not feel that their cultural heritage influenced their home textile preferences gave a lower score to style than those who indicated that they felt their cultural heritage did influence their home textile preferences in some way.

Research Considerations

While one sample t-tests and post hoc ANOVA analyses were conducted, interpretation is limited to the sample and is not generalizable to a larger population. As indicated in Chapter III, the goal of this study is to use a convergence of evidence, thereby providing information about possible trends in consumer preferences based on a variety of sources of evidence. Therefore, this preliminary investigation offers a basis for further research in the area of consumer preferences of home textile products.

One limitation of using a Likert scale is that not all respondents interpret the scale in the same way. Also, the researcher as well as each respondent may assign different meanings to the headers provided on the survey instrument. For instance, a respondent may choose NOT IMPORTANT instead of NEUTRAL when they are trying to express having no preference.

The researcher introduced bias into the observation technique in that interpretations of the open-ended responses were filtered by the researcher's existing assumptions about home textile products.

CHAPTER V

Summary

The purposes of this study were to define the U.S. home textile industry by means of an industry profile, explore the buyer characteristics and purchase decision factors that may be important to U.S. Hispanic consumers as it relates to their purchases of home textile products, and determine if products are currently available to satisfy the expressed preferences of the Hispanic home textile consumer. Using known variables for consumer preferences for apparel and pairing them with variables unique to home textiles (e.g. thread count, bed-in-a-bag packaging, sateen weave), this study explored the importance Hispanic consumers place on traditional purchase variables when shopping for home fashions. Thirty Hispanic women completed a questionnaire regarding their home textile preferences for product characteristics and retail channel. The data were analyzed with descriptive statistics and one-sample tests for significance. This research provides a foundation for future research in an emerging area of consumer study by establishing a framework for investigations into home textile markets.

Conclusions

Research Objective One

Privately held Springs is larger in terms of sales volume than publicly traded WestPoint Stevens, and WestPoint Stevens focuses more on sheets and towels while Springs offers additional products including ceramic bath accessories. The two companies have similar customer bases, both making most of their sales to retailers, including discount, specialty and department store channels, as opposed to hospitality or institutional customers. Table 8 highlights these similarities.

The two largest specialty retailers were found to have more similarities than the two largest home textiles manufacturers. Bed Bath & Beyond and Linens 'n Things have nearly identical product offerings, share similar business strategies and seem to cater to the same customer base. Both companies are publicly traded, though Bed Bath & Beyond is larger, operates without debt (in contrast to Linens 'n Things which uses leverage in its accounting practices), and gives its individual stores more control over the merchandise mix available in each store. The companies place stores in similar areas, frequently within the same shopping centers, offer similar products at similar price points, and accept each other's coupons. There seems to be very little differentiation between Bed Bath & Beyond and Linens 'n Things.

Research Objective Two

According to t-tests for differences in means, ANOVA and descriptive statistics, the five most important purchase criteria for home textiles for female Hispanic college students in North Carolina are the price, color and style of bedding and the price and color of bath products. Two-tailed t-tests indicated that the importance levels of price, color, style, fiber content and fabric type were all significantly higher than 3. The same test showed that brand name had an importance level of significantly lower than 3. Thread count was the only factor of the bedding decision criteria that was not statistically different than 3, meaning the respondents felt generally neutral about the thread count of bedding products. This finding runs counter to the current industry trend that favors increased thread count as a source of differentiation among products. For both bedding and bath products, the importance of brand name was rated significantly less than 3. This result challenges existing research that suggests Hispanic buyers are brand-loyal, and supports reports that Hispanic buyers shop based on price rather than brand.

The observation of home textile mass specialty retailers revealed that bath products satisfying the preferences of the respondents were more widely available than bedding products satisfying those same preferences.

Implications

The results of this research provide advancement in the knowledge of consumer preferences for home textiles products. Prior to this study, little to no empirical research had addressed consumer preferences using variables unique to the home textile industry. The context of this study addresses the increasing buying power of the fast-growing Hispanic population. In finding that price, color and style were the most important purchase criteria for home textiles, a link has been formed between consumer purchase decision criteria for home textiles and the more thoroughly studied area of consumer purchase behavior for apparel products which was addressed in the literature review (Eckman, Damhorst & Kandolph, 1990; Kim, 2001, Kulkarni, 1995, Thomas, Cassill & Forsythe, 1991).

Table 16. The Level of Importance of Bedding Criteria Ranked by Mean

Criteria	Level of Importance
Price	Important
Color	Important
Style	Important
Coordination of bedding	Important
Fiber content	Slightly higher than Neutral
Fabric type	Slightly higher than Neutral
Packaged sets	Slightly higher than Neutral
Brand name	Less Important
Coordination between bedding/bath	Less Important

Note. The criteria are listed in descending order according to mean.

Table 17. The Level of Importance of Bath Criteria Ranked by Mean

Criteria	Level of Importance
Price	Important
Color	Important
Style	Important
Coordination for bath products	Slightly higher than Neutral
Brand name	Less Important
Coordination between bedding/bath	Less Important

Note. The criteria are listed in descending order according to mean.

A t-test for significance indicated that the average importance ratings for Questions 4a and 4b were significantly different than 3 ($p<.01$, $p<.01$). Both are higher than 3, indicating that coordination is IMPORTANT ($M=4.27$, $M=3.83$). However, the mean for coordination between both bedding and bath was below 3 ($M=2.43$), suggesting less importance. This may be an important consideration for home textile lines such as Thalia's bed and bath styles, which offer the product lines with bedding and coordinating bath products.

Both the manufacturer and retailer of a product have an influence on the consumer. In the case of the U.S. home textile industry, Springs Industries and WestPoint Stevens represent the largest manufacturers while Bed Bath & Beyond and Linens 'n Things represent the largest mass specialty retailers. Mass specialty retailers of home textile products are an important retail channel because they are quickly gaining market share of home textile sales.

The results of the survey portion of this research offer clarification to the effects of buyer characteristics on the decision process that takes place with influence from the manufacturers and retailers of home textiles. The importance a consumer market places on various purchase decision criteria can be a function of that market's characteristics. Future research should expand on the exploratory concepts presented in this study. There was an apparent contradiction in the preferences for thread count. The results of Question 6d indicated that the average response was NEUTRAL. However 17% (four of the twenty four responses) of the open ended question about bedding preferences indicated that high thread count was important. This could be due to a wide variability in thread count preferences which may be linked to a demographic factor such as age or income. However, the average response indicated a preference for discount stores. NEUTRAL interest in thread count might be linked to the retail channel preference.

Retailers and manufacturers can benefit from an understanding of buyer purchase decision criteria, and can use it to more accurately forecast buyer responses. If a retailer knows how to adjust its marketing mix based on environmental stimuli, understanding what occurs in the black box of buyer behavior will provide additional insight into consumers' demand for a potential product. The Convergence of Evidence approach (Yin, 2003) was effective in providing a preliminary examination of the purchase decision factors that were important to the respondents of the study. The approach provided a multifaceted perspective of the Hispanic market which can be used by manufacturers and retailers as they begin to further explore new market opportunities for home textile products.

Several responses to Question 9b support information found in a Home Textiles Today trade article (Silverstein & Fiske, 2004). 'America Loves to Trade Up' describes one current trend in which consumers enjoy their disposable income most by saving money in some areas ("trading down") so they have extra money to spend in other areas ("trading up"). The article reported that consumers trade up in bedding and trade down in bath linens. Part of survey respondent 9's answer to Question 9b was "towels are towels," providing evidence that she trades down on towels. Survey respondent 19 included the following in her response to Question 9b: "I'd much rather invest my money in quality bedding than shower curtains," clearly showing her preference to trade up in bedding.

Recommendations for Future Research

The disparity between government reports and personal comments of the respondents indicates an opportunity for further study of the use of the terms Latino (and Latina) and Hispanic and understanding the impact of country of origin on the buyer decision process. The U.S. Census Bureau reports that Hispanics may be of any race (U.S. Census Bureau, 2003), so the term Hispanic was used to describe ethnicity throughout the course of this study. Of the survey respondents, 96.7% (n=29) indicated an ethnicity of "Hispanic." The single respondent who indicated her ethnicity as "other" specified in Question 10 of the questionnaire, which asks for general comments and feedback about the study, that she considers there to be a difference between Hispanic and Latina. If the research had used different terminologies, the respondents may have provided different responses to the questions. A market may also be defined differently based on subtle differences in the connotations of terminologies used to describe it.

A study that evaluates the level of ethnic identification compared to the variation in levels of criteria importance would increase understanding of buyer characteristics. As Question 9c1 was used in Research Question Fourteen to identify how much the respondents thought their cultural heritage influenced their home textile preferences, a measure of how strongly the subject identifies as a member of their ethnic group could be used as the independent variable to examine patterns of segmentation for additional preferences.

Wide inconsistencies in the terminology and definitions of home textile terms provide an additional opportunity for future research in the form of a literature review to establish a lexicon of home textile terminology. A more complete collection of currently published home textile definitions as well as an industry survey could be used to find out how manufactures and retailers define their products.

In future studies, income level could be compared to preferences in retail channel. Retrospectively, Question 8f regarding respondent income was not as helpful as it could have been because it did not specify if the respondents were financially independent, or supported by other members of their families and it did not specify if the income level was the entire household income or the respondent's personal income. This presents an area for clarification in future studies in which a more specific aspect of income could be compared to aspects of the buying process such as preferred retail channel.

A connection for continued study of the level of preference for each type of bedding packaging would clarify the apparent preference for bed-in-a-bag packaging found in this study. Half of the respondents indicated that their preferred packaging of bedding products was the bed-in-a-bag. Results of a one-sample t-test indicated that respondents' average importance rating for question 6h (importance of the availability of packaged sets) was significantly above 3.

Observations of additional retail channels, including online retailers, for availability of products would shed light on the availability of preferred products and could be compared to the preferred channel for a variety of markets. In this study, the availability of specific products was determined by a visual assessment of home textile mass specialty retail floors. The preferred retail channels vary based on the target market. It would be beneficial to ascertain whether the preferred retail channel offers specifically demanded products more readily than other retail channels, based on the characteristics of the target market.

Replications of any part of this research with larger samples, random samples or samples from other markets would further contribute to the current body of knowledge about the home textile preferences of consumers. Following the blueprint of the convergence of evidence approach or focusing one facet of the approach in a quantitative manner would provide useful information about concepts that were investigated in an exploratory fashion in this research.

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APPENDIX A

Test for Significance of Likert Scale Variables

One-Sample Test

	Test Value = 3					
					95% Confidence Interval of the Difference	
	t	df	Sig. (2-tailed)	Mean Difference	Lower	Upper
Q2A	2.911	29	.007	.7000	.2082	1.1918
Q2B	1.624	29	.115	.3333	-.0865	.7532
Q2C	1.439	29	.161	.4000	-.1684	.9684
Q3	-4.871	29	.000	-.6000	-.8519	-.3481
Q4A	7.990	29	.000	1.2667	.9424	1.5909
Q4B	3.470	29	.002	.8333	.3422	1.3245
Q5	-2.429	29	.022	-.5667	-1.0439	-.0894
Q6A	9.424	29	.000	1.4000	1.0962	1.7038
Q6B	11.195	29	.000	1.3667	1.1170	1.6164
Q6C	9.379	29	.000	1.2667	.9905	1.5429
Q6D	-4.292	29	.000	-.8667	-1.2796	-.4537
Q6E	3.084	29	.004	.6667	.2245	1.1088
Q6F	5.413	29	.000	.9333	.5807	1.2860
Q6G	.942	29	.354	.2333	-.2732	.7399
Q6H	2.183	29	.037	.4000	.0253	.7747
Q7A	9.337	29	.000	1.4667	1.1454	1.7879
Q7B	7.215	29	.000	1.1333	.8121	1.4546
Q7C	5.214	29	.000	1.0000	.6078	1.3922
Q7D	-4.176	29	.000	-.8667	-1.2911	-.4422
Q7E	1.439	29	.161	.2667	-.1123	.6456
Q7F	-.297	29	.769	-.0667	-.5259	.3926
Q8A	-7.870	29	.000	-1.2333	-1.5539	-.9128
Q8B	-3.970	29	.000	-.8667	-1.3132	-.4202
Q8C	-4.038	29	.000	-.7667	-1.1550	-.3783

APPENDIX B

Questionnaire Instrument

Consumer Preferences
of Home Textile Products

Sunday Apr 25, 2004

	Discount store Ex: Wal-Mart, Kmart, Target	Department store Ex: Sears, JC Penney, Nordstrom	Specialty store Ex: Bed Bath Beyond, Linens N Things
1. At which type of store do you shop most frequently for bedding and bath products? (Choose one)			

2. For each type of store (2a - 2c) choose your preference for purchasing bedding and bath products:	Least Prefer 1	2	3	4	Most Prefer 5
2a. Discount store					
2b. Department store					
2c. Specialty store					

	Individual items (single fitted sheet sold separately from flat sheet and pillowcase)	Packaged Set (flat sheet, fitted sheet and pillowcase set sold together)	Bed-in-a-bag (includes sheets, pillowcase, comforter and bed skirt)
3. How do you prefer to purchase bedding products? (Choose one)			

	Not Important 1	2	3	4	Very Important 5
4a. How important is the availability of coordinated items for bedding products (sheets, pillowcases, comforters bed skirts)?					
4b. How important is the availability of coordinated items for bath products (towels, shower curtains, bathroom accessories)?					
5. How important is the availability of coordination between bath products and bedding products?					

6. How important is each of the following items when purchasing bedding products (sheets, pillow cases, comforters)?	Not Important 1	2	3	4	Very Important 5
6a. Price					
6b. Color					
6c. Style					
6d. Brand Name/Designer					
6e. Fiber Content (ex: 100% cotton or 60% Cotton, 40% Polyester)					
6f. Fabric Type (ex: woven, satin, sateen, t-shirt sheets)					
6g. Thread Count (ex: 180, 220 or 300)					
6h. Availability of packaged sets					

7. How important is each of the following items when purchasing bath products (towels, bath rugs, shower curtains)?	Not Important 1	2	3	4	Very Important 5

7a. Price					
7b. Color					
7c. Style					
7d. Brand Name/Designer					
7e. Fiber Content (ex: 100% cotton or 60% Cotton, 40% Polyester)					
7f. Availability of packaged sets					

8a. About how many times per year do you purchase bedding products (sheets, pillowcases. comforters, bed skirts)?	less than 1	2	3	4	more than 5
8b. About how many times per year do you purchase bath products (towels, shower curtains, bathroom accessories)?	less than 1	2	3	4	more than 5
8c. Keeping up with the latest home fashion trend is:	Not Important 1	2	3	4	Very Important 5
8d. Age:	18-20	21-24	25-27	28-30	31+
8e. Ethnicity:	White	Black	Hispanic	Native American	Other
8f. Approximate income:	less than $20,000	$20,001 - $40,000	40,001 - $60,000	more than $60,001	

9a. Please describe your preferences in bedding (Ex: color, fabric, pattern, style)

9b. Please describe your preferences in bath products (Ex: color, fabric, pattern, style etc)

9c. How do you feel your cultural heritage influences the colors or style preferences bedding or bath products?

10. General Comments/Feedback on the Study:

Submit

APPENDIX C

Home Textile Mass Specialty Retailer Bedding Product Availability Data Capture Sheet

Store Visit Data Capture Sheet

Bedding

Store: ____________

Location: ____________

		Bed-in-a-Bag	Packaged Sets
Color Categories			
	Bright		
	Dark		
	Spring/Pastel/Tropical		
Named Colors			
	Blue/Tan		
	Orange/Yellow		
	Purple/Black/White		
	Red		
Patterns			
	Light against dark		
	No pattern (solid colors)		
	Simple patterns		
Other			
	100% Cotton		
	High thread count:		
	230-280: better		
	300-400: best		
	T-shirt sheets available?		
Labeled as			
	Soft/comfortable		
	Washable/functional		

APPENDIX D

Home Textile Mass Specialty Retailer Bath Product Availability Data Capture Sheet

Store Visit Data Capture Sheet

Bath

Store: ____________________

Location: ____________________

		Towels	**Rugs**	**Shower Curtains**
Color Categories				
	Bright			
	Dark			
	Spring/Pastel/Tropical			
Named Colors				
	Clear (Shower curtain)			
	Gray/Blue			
	Green/Purple			
	Orange/Yellow			
	White			
Patterns				
	No pattern (solid colors)			
	Simple patterns			
	Symmetric patterns			
Other				
	100% Cotton			
Labeled as				
	Easy Care/Washable			
	Price			
	Soft/Comfortable			

APPENDIX E

Post Hoc Analysis of Ordinal Questionnaire Results

Table E1. Descriptive Statistics from ANOVA: 9c1 and Importance of Bedding Criteria

Descriptives

		N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
						Lower Bound	Upper Bound		
Q6A	.00	8	4.6250	.74402	.26305	4.0030	5.2470	3.00	5.00
	1.00	10	4.0000	1.05409	.33333	3.2459	4.7541	2.00	5.00
	2.00	12	4.5833	.51493	.14865	4.2562	4.9105	4.00	5.00
	Total	30	4.4000	.81368	.14856	4.0962	4.7038	2.00	5.00
Q6B	.00	8	4.3750	.74402	.26305	3.7530	4.9970	3.00	5.00
	1.00	10	4.1000	.73786	.23333	3.5722	4.6278	3.00	5.00
	2.00	12	4.5833	.51493	.14865	4.2562	4.9105	4.00	5.00
	Total	30	4.3667	.66868	.12208	4.1170	4.6164	3.00	5.00
Q6C	.00	8	4.6250	.51755	.18298	4.1923	5.0577	4.00	5.00
	1.00	10	3.8000	.78881	.24944	3.2357	4.3643	3.00	5.00
	2.00	12	4.4167	.66856	.19300	3.9919	4.8414	3.00	5.00
	Total	30	4.2667	.73968	.13505	3.9905	4.5429	3.00	5.00
Q6D	.00	8	2.1250	1.24642	.44068	1.0830	3.1670	1.00	4.00
	1.00	10	2.0000	1.05409	.33333	1.2459	2.7541	1.00	4.00
	2.00	12	2.2500	1.13818	.32856	1.5268	2.9732	1.00	4.00
	Total	30	2.1333	1.10589	.20191	1.7204	2.5463	1.00	4.00
Q6E	.00	8	4.0000	.92582	.32733	3.2260	4.7740	3.00	5.00
	1.00	10	3.3000	1.25167	.39581	2.4046	4.1954	1.00	5.00
	2.00	12	3.7500	1.28806	.37183	2.9316	4.5684	1.00	5.00
	Total	30	3.6667	1.18419	.21620	3.2245	4.1088	1.00	5.00
Q6F	.00	8	4.2500	.88641	.31339	3.5089	4.9911	3.00	5.00
	1.00	10	3.4000	.84327	.26667	2.7968	4.0032	2.00	4.00
	2.00	12	4.1667	.93744	.27061	3.5710	4.7623	2.00	5.00
	Total	30	3.9333	.94443	.17243	3.5807	4.2860	2.00	5.00
Q6G	.00	8	3.2500	1.58114	.55902	1.9281	4.5719	1.00	5.00
	1.00	10	3.0000	1.33333	.42164	2.0462	3.9538	1.00	5.00
	2.00	12	3.4167	1.31137	.37856	2.5835	4.2499	1.00	5.00
	Total	30	3.2333	1.35655	.24767	2.7268	3.7399	1.00	5.00
Q6H	.00	8	3.8750	.99103	.35038	3.0465	4.7035	3.00	5.00
	1.00	10	2.9000	.99443	.31447	2.1886	3.6114	1.00	4.00
	2.00	12	3.5000	.90453	.26112	2.9253	4.0747	2.00	5.00
	Total	30	3.4000	1.00344	.18320	3.0253	3.7747	1.00	5.00

Table E2. Descriptive Statistics from ANOVA: 9c1 and Importance of Bath Criteria

Descriptives

		N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
						Lower Bound	Upper Bound		
Q7A	.00	8	4.2500	1.38873	.49099	3.0890	5.4110	1.00	5.00
	1.00	10	4.3000	.67495	.21344	3.8172	4.7828	3.00	5.00
	2.00	12	4.7500	.45227	.13056	4.4626	5.0374	4.00	5.00
	Total	30	4.4667	.86037	.15708	4.1454	4.7879	1.00	5.00
Q7B	.00	8	3.8750	1.24642	.44068	2.8330	4.9170	1.00	5.00
	1.00	10	4.0000	.66667	.21082	3.5231	4.4769	3.00	5.00
	2.00	12	4.4167	.66856	.19300	3.9919	4.8414	3.00	5.00
	Total	30	4.1333	.86037	.15708	3.8121	4.4546	1.00	5.00
Q7C	.00	8	3.8750	1.24642	.44068	2.8330	4.9170	1.00	5.00
	1.00	10	3.7000	1.15950	.36667	2.8705	4.5295	1.00	5.00
	2.00	12	4.3333	.77850	.22473	3.8387	4.8280	3.00	5.00
	Total	30	4.0000	1.05045	.19179	3.6078	4.3922	1.00	5.00
Q7D	.00	8	2.2500	1.38873	.49099	1.0890	3.4110	1.00	4.00
	1.00	10	2.0000	.94281	.29814	1.3256	2.6744	1.00	3.00
	2.00	12	2.1667	1.19342	.34451	1.4084	2.9249	1.00	4.00
	Total	30	2.1333	1.13664	.20752	1.7089	2.5578	1.00	4.00
Q7E	.00	8	3.1250	1.24642	.44068	2.0830	4.1670	1.00	5.00
	1.00	10	2.8000	.91894	.29059	2.1426	3.4574	1.00	4.00
	2.00	12	3.7500	.75378	.21760	3.2711	4.2289	3.00	5.00
	Total	30	3.2667	1.01483	.18528	2.8877	3.6456	1.00	5.00
Q7F	.00	8	3.7500	1.28174	.45316	2.6784	4.8216	1.00	5.00
	1.00	10	2.5000	1.26930	.40139	1.5920	3.4080	1.00	5.00
	2.00	12	2.7500	.96531	.27866	2.1367	3.3633	1.00	4.00
	Total	30	2.9333	1.22990	.22455	2.4741	3.3926	1.00	5.00

Table E3. ANOVA Results for 9c1 and Importance of Bedding Criteria

ANOVA

		Sum of Squares	df	Mean Square	F	Sig.
Q6A	Between Groups	2.408	2	1.204	1.936	.164
	Within Groups	16.792	27	.622		
	Total	19.200	29			
Q6B	Between Groups	1.275	2	.638	1.472	.247
	Within Groups	11.692	27	.433		
	Total	12.967	29			
Q6C	Between Groups	3.475	2	1.738	3.786	.036
	Within Groups	12.392	27	.459		
	Total	15.867	29			
Q6D	Between Groups	.342	2	.171	.131	.877
	Within Groups	35.125	27	1.301		
	Total	35.467	29			
Q6E	Between Groups	2.317	2	1.158	.816	.453
	Within Groups	38.350	27	1.420		
	Total	40.667	29			
Q6F	Between Groups	4.300	2	2.150	2.692	.086
	Within Groups	21.567	27	.799		
	Total	25.867	29			
Q6G	Between Groups	.950	2	.475	.245	.785
	Within Groups	52.417	27	1.941		
	Total	53.367	29			
Q6H	Between Groups	4.425	2	2.213	2.411	.109
	Within Groups	24.775	27	.918		
	Total	29.200	29			

Table E4. ANOVA Results for 9c1 and Importance of Bath Criteria

ANOVA

		Sum of Squares	df	Mean Square	F	Sig.
Q7A	Between Groups	1.617	2	.808	1.099	.347
	Within Groups	19.850	27	.735		
	Total	21.467	29			
Q7B	Between Groups	1.675	2	.838	1.143	.334
	Within Groups	19.792	27	.733		
	Total	21.467	29			
Q7C	Between Groups	2.358	2	1.179	1.074	.356
	Within Groups	29.642	27	1.098		
	Total	32.000	29			
Q7D	Between Groups	.300	2	.150	.109	.897
	Within Groups	37.167	27	1.377		
	Total	37.467	29			
Q7E	Between Groups	5.142	2	2.571	2.807	.078
	Within Groups	24.725	27	.916		
	Total	29.867	29			
Q7F	Between Groups	7.617	2	3.808	2.837	.076
	Within Groups	36.250	27	1.343		
	Total	43.867	29			

Table E5. Least Squared Differences Analysis for 9c1 and Bedding Criteria

Multiple Comparisons

LSD

Dependent Variable	(I) Q9C1	(J) Q9C1	Mean Difference (I-J)	Std. Error	Sig.	95% Confidence Interval Lower Bound	95% Confidence Interval Upper Bound
Q6A	.00	1.00	.6250	.37407	.106	-.1425	1.3925
		2.00	.0417	.35995	.909	-.6969	.7802
	1.00	.00	-.6250	.37407	.106	-1.3925	.1425
		2.00	-.5833	.33766	.095	-1.2762	.1095
	2.00	.00	-.0417	.35995	.909	-.7802	.6969
		1.00	.5833	.33766	.095	-.1095	1.2762
Q6B	.00	1.00	.2750	.31214	.386	-.3655	.9155
		2.00	-.2083	.30036	.494	-.8246	.4079
	1.00	.00	-.2750	.31214	.386	-.9155	.3655
		2.00	-.4833	.28176	.098	-1.0615	.0948
	2.00	.00	.2083	.30036	.494	-.4079	.8246
		1.00	.4833	.28176	.098	-.0948	1.0615
Q6C	.00	1.00	.8250*	.32135	.016	.1657	1.4843
		2.00	.2083	.30922	.506	-.4261	.8428
	1.00	.00	-.8250*	.32135	.016	-1.4843	-.1657
		2.00	-.6167*	.29007	.043	-1.2118	-.0215
	2.00	.00	-.2083	.30922	.506	-.8428	.4261
		1.00	.6167*	.29007	.043	.0215	1.2118
Q6D	.00	1.00	.1250	.54103	.819	-.9851	1.2351
		2.00	-.1250	.52060	.812	-1.1932	.9432
	1.00	.00	-.1250	.54103	.819	-1.2351	.9851
		2.00	-.2500	.48837	.613	-1.2520	.7520
	2.00	.00	.1250	.52060	.812	-.9432	1.1932
		1.00	.2500	.48837	.613	-.7520	1.2520
Q6E	.00	1.00	.7000	.56532	.226	-.4599	1.8599
		2.00	.2500	.54398	.649	-.8661	1.3661
	1.00	.00	-.7000	.56532	.226	-1.8599	.4599
		2.00	-.4500	.51030	.386	-1.4970	.5970
	2.00	.00	-.2500	.54398	.649	-1.3661	.8661
		1.00	.4500	.51030	.386	-.5970	1.4970
Q6F	.00	1.00	.8500	.42394	.055	-.0198	1.7198
		2.00	.0833	.40793	.840	-.7537	.9203
	1.00	.00	-.8500	.42394	.055	-1.7198	.0198
		2.00	-.7667	.38268	.055	-1.5519	.0185
	2.00	.00	-.0833	.40793	.840	-.9203	.7537
		1.00	.7667	.38268	.055	-.0185	1.5519
Q6G	.00	1.00	.2500	.66091	.708	-1.1061	1.6061
		2.00	-.1667	.63596	.795	-1.4716	1.1382
	1.00	.00	-.2500	.66091	.708	-1.6061	1.1061
		2.00	-.4167	.59659	.491	-1.6408	.8074
	2.00	.00	.1667	.63596	.795	-1.1382	1.4716
		1.00	.4167	.59659	.491	-.8074	1.6408
Q6H	.00	1.00	.9750*	.45438	.041	.0427	1.9073
		2.00	.3750	.43722	.399	-.5221	1.2721
	1.00	.00	-.9750*	.45438	.041	-1.9073	-.0427
		2.00	-.6000	.41015	.155	-1.4416	.2416
	2.00	.00	-.3750	.43722	.399	-1.2721	.5221
		1.00	.6000	.41015	.155	-.2416	1.4416

*. The mean difference is significant at the .05 level.

Table E6. Least Squared Differences Analysis for 9c1 and Bath Criteria

Multiple Comparisons

LSD

Dependent Variable	(I) Q9C1	(J) Q9C1	Mean Difference (I-J)	Std. Error	Sig.	95% Confidence Interval	
						Lower Bound	Upper Bound
Q7A	.00	1.00	-.0500	.40671	.903	-.8845	.7845
		2.00	-.5000	.39136	.212	-1.3030	.3030
	1.00	.00	.0500	.40671	.903	-.7845	.8845
		2.00	-.4500	.36713	.231	-1.2033	.3033
	2.00	.00	.5000	.39136	.212	-.3030	1.3030
		1.00	.4500	.36713	.231	-.3033	1.2033
Q7B	.00	1.00	-.1250	.40612	.761	-.9583	.7083
		2.00	-.5417	.39079	.177	-1.3435	.2602
	1.00	.00	.1250	.40612	.761	-.7083	.9583
		2.00	-.4167	.36659	.266	-1.1688	.3355
	2.00	.00	.5417	.39079	.177	-.2602	1.3435
		1.00	.4167	.36659	.266	-.3355	1.1688
Q7C	.00	1.00	.1750	.49700	.727	-.8448	1.1948
		2.00	-.4583	.47824	.346	-1.4396	.5229
	1.00	.00	-.1750	.49700	.727	-1.1948	.8448
		2.00	-.6333	.44863	.169	-1.5538	.2872
	2.00	.00	.4583	.47824	.346	-.5229	1.4396
		1.00	.6333	.44863	.169	-.2872	1.5538
Q7D	.00	1.00	.2500	.55653	.657	-.8919	1.3919
		2.00	.0833	.53552	.877	-1.0155	1.1821
	1.00	.00	-.2500	.55653	.657	-1.3919	.8919
		2.00	-.1667	.50236	.743	-1.1974	.8641
	2.00	.00	-.0833	.53552	.877	-1.1821	1.0155
		1.00	.1667	.50236	.743	-.8641	1.1974
Q7E	.00	1.00	.3250	.45392	.480	-.6064	1.2564
		2.00	-.6250	.43678	.164	-1.5212	.2712
	1.00	.00	-.3250	.45392	.480	-1.2564	.6064
		2.00	-.9500*	.40974	.028	-1.7907	-.1093
	2.00	.00	.6250	.43678	.164	-.2712	1.5212
		1.00	.9500*	.40974	.028	.1093	1.7907
Q7F	.00	1.00	1.2500*	.54962	.031	.1223	2.3777
		2.00	1.0000	.52887	.069	-.0852	2.0852
	1.00	.00	-1.2500*	.54962	.031	-2.3777	-.1223
		2.00	-.2500	.49613	.618	-1.2680	.7680
	2.00	.00	-1.0000	.52887	.069	-2.0852	.0852
		1.00	.2500	.49613	.618	-.7680	1.2680

*. The mean difference is significant at the .05 level.